

MARKETING REPORTING:

Why Contact Roles are Mission Critical and How You Can Effectively Add Them

Advanced | Admin



Jen Kazin
Greenkey



Talking points

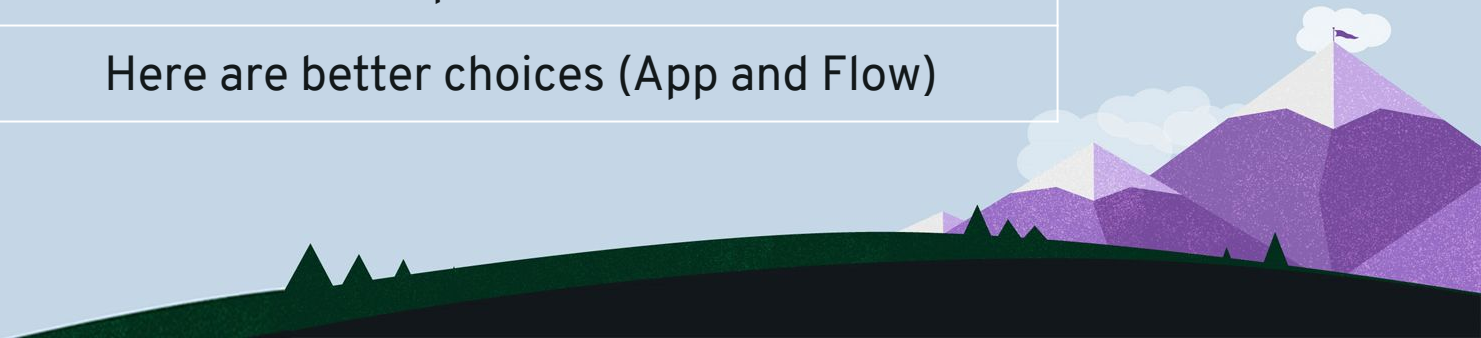
AGENDA

What is Campaign Influence?

Why Marketers need Contact Roles

What Most Companies Do (Don't to this)

Here are better choices (App and Flow)

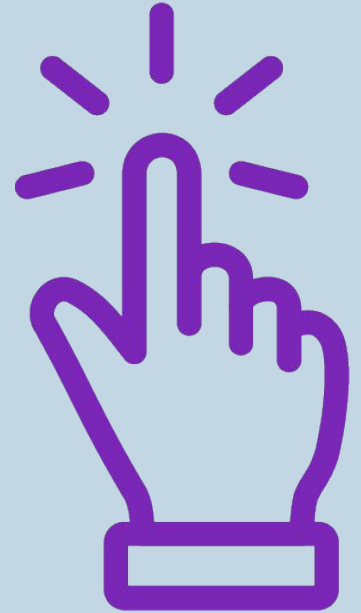


Meet Erin...



There was one key thing that Erin did

She showed the marketing touchpoints on leads with opportunities won.



Here's what she showed management...

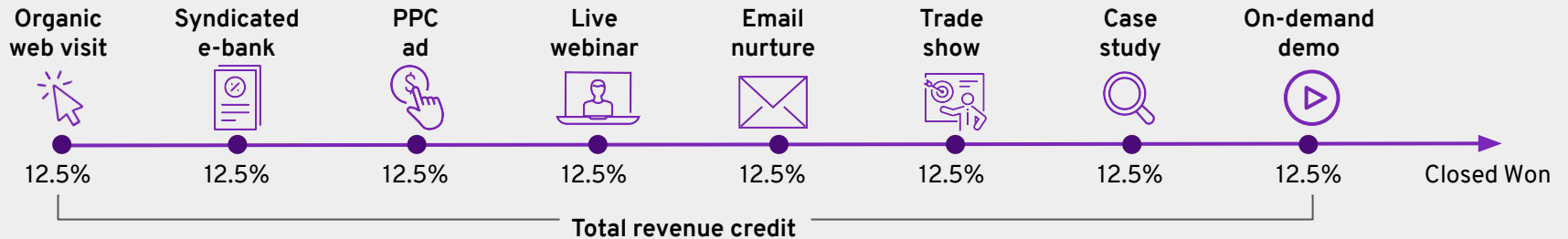
Report: Campaigns with Influenced Opportunities (Customizable Campaign Influence)

Campaign Influence

Campaign Type ↑	Opportunities in Campaign	Responded	Contact Name	Primary Campaign Source	Opportunity Name	Opportunity Amount
ABM (1)	1	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$15,089.50
Advertising (1)	1	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$15,058.00
Content (1001)	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$17,334.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$1,125.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$41,520.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$2,250.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$46,010.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	-
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$14,000.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$30,000.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$14,300.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input checked="" type="checkbox"/>	[Redacted]	\$16,500.00
	1	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$27,500.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$15,840.00
	13	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$90,000.00
	19	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$90,000.00
	20	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$90,000.00
	601	<input checked="" type="checkbox"/>	[Redacted]	<input type="checkbox"/>	[Redacted]	\$13,200.00

Erin used Campaign Influence

Campaign Influence is Pardot's most influential marketing report. Pardot Campaign Influence Attribution Models provide marketers with easy to use, out-of-the-box attribution models that leverage Salesforce campaigns and opportunities for advanced ROI reporting.



Learn more about Campaign Influence

Day 1 — 10:50 am ET - 11:30 am ET



Intermediate | Admin

Secrets and Mysteries of Campaign Influence



Bill Fetter

Founder,
UnFettered Marketing

FEATURES & FUNCTIONS

LEAD MANAGEMENT

But here's the catch...

Campaign Influence doesn't work
without contact roles.



What's a Contact Role?

Opportunity
Burlington Textiles Weaving Plant Generator

+ Follow New Case New Note Clone

Account Name: Burlington Textiles Corp of America Close Date: 11/21/2020 Amount: \$235,000.00 Opportunity Owner: Brian Nelson

Progress: Closed Won Change Closed Stage

Details Chatter

Opportunity Owner	Brian Nelson	Amount	\$235,000.00
Private	<input type="checkbox"/>	Expected Revenue	\$235,000.00
Opportunity Name	Burlington Textiles Weaving Plant Generator	Close Date	11/21/2020
Account Name	Burlington Textiles Corp of America	Next Step	
Type	New Customer	Stage	Closed Won
Lead Source	Web	Probability (%)	100%
Order Number	645612	Primary Campaign Source	
Current Generator(s)	John Deere	Main Competitor(s)	John Deere
		Delivery/Installation Status	Yet to begin

Related

- Products (0)
- Notes & Attachments (0)
Upload Files
Or drop files
- Contact Roles (1)**
Sally Jensen
Role: Decision Maker
Title:
View All

Campaign Influence needs...

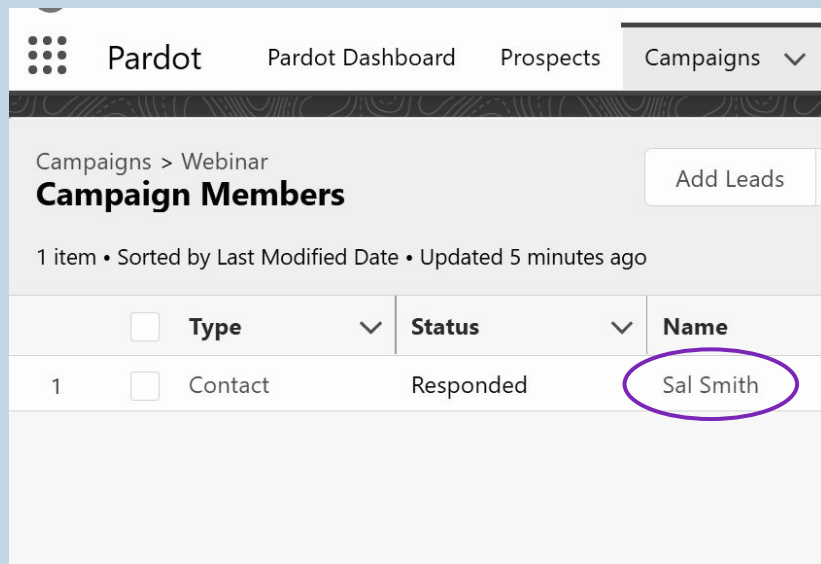
**Campaign
Member
Sal Smith**

CONNECT!

**Contact Role
Sal Smith**



CAMPAIGN



Pardot Dashboard > Prospects > Campaigns

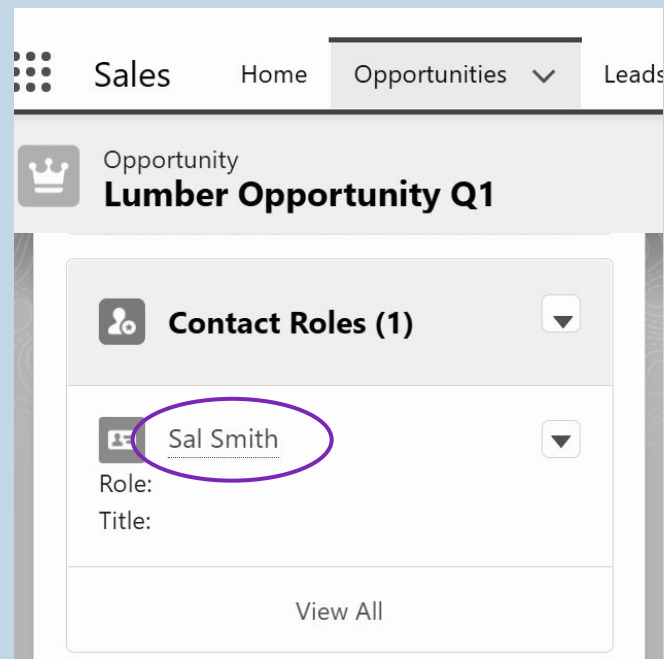
Campaigns > Webinar

Campaign Members Add Leads

1 item • Sorted by Last Modified Date • Updated 5 minutes ago

	Type	Status	Name
1	Contact	Responded	Sal Smith

OPPORTUNITY



Sales Home > Opportunities

Opportunity **Lumber Opportunity Q1**

Contact Roles (1)

- Sal Smith

Role:
Title:

[View All](#)

How many companies are effective at adding contact roles?

Companies **WITHOUT** Contact Roles



Companies **WITH** Contact Roles



Check your Contact Roles

1. Go to Set up > Report Types
2. Choose “New Custom Report”

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Identification

Report Type Label

Report Type Name ⓘ

Note: Description will be visible to users who create reports.

Description

Store in Category

3.

SETUP
Report Types

This report type will generate reports about Opportunities. You may define which related results by choosing a relationship to another object.

A Opportunities
Primary Object

B

A to B Relationship:

Each "A" record must have at least one related "B" record.

"A" records may or may not have related "B" records.



	Opportunity Name	Full Name
1235
1236
1237
1238
1239
1240
1241
1242
1243
1244
1245
1246
1247	...	-
1248	...	-
1249	...	-
1250	...	-
1251	...	-
1252	...	-
1253	...	-

#PARDREAMIN2021 |
@PARDREAMIN

What do other companies do?

1. Train Sales
2. Use a Validation Rule to require a contact role
3. Force Sales to create opportunities only from leads and contacts
4. Manually add contact roles monthly



Two better ways to get the job done

1

Use an AppExchange
Package -
Automated Opportunity
Contact Roles

2

Create a Flow that will add
Contact Roles on
Opportunity creation



#1

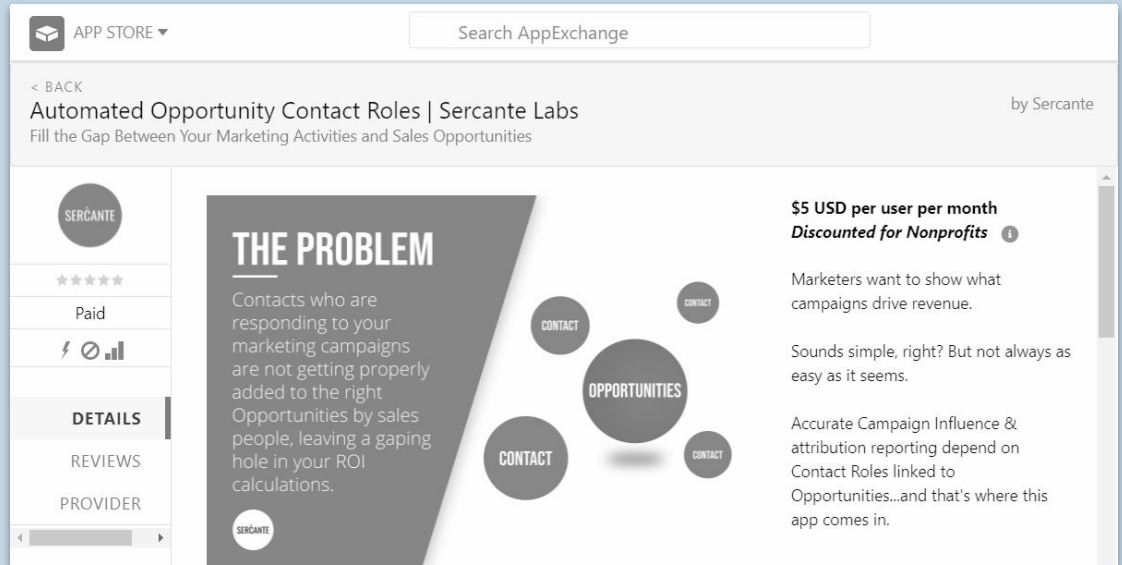
AppExchange Package

Automated Opportunity Contact Roles

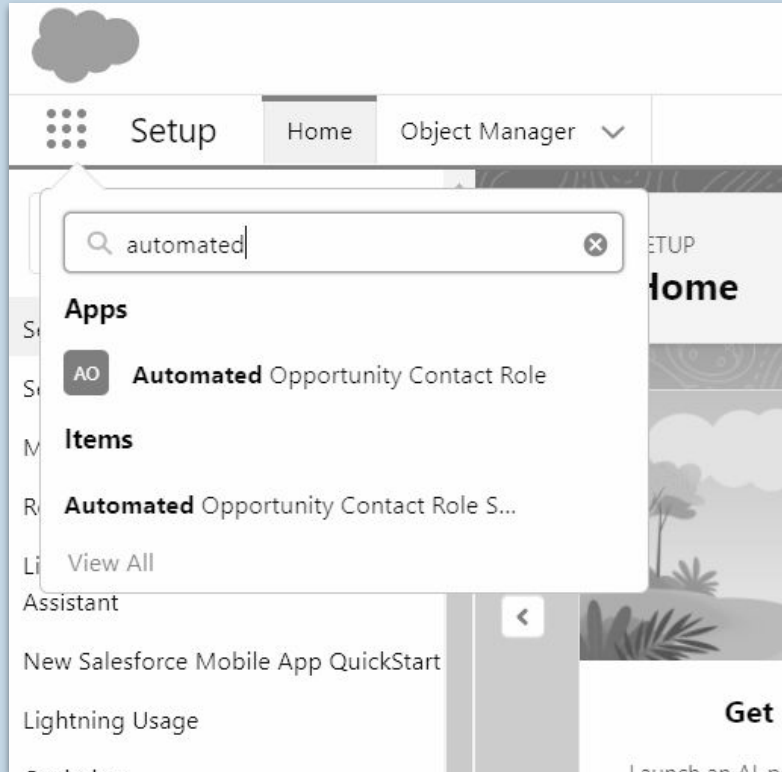
Go to
Setup > AppExchange

Choose “Automated
Opportunity Contact
Roles”

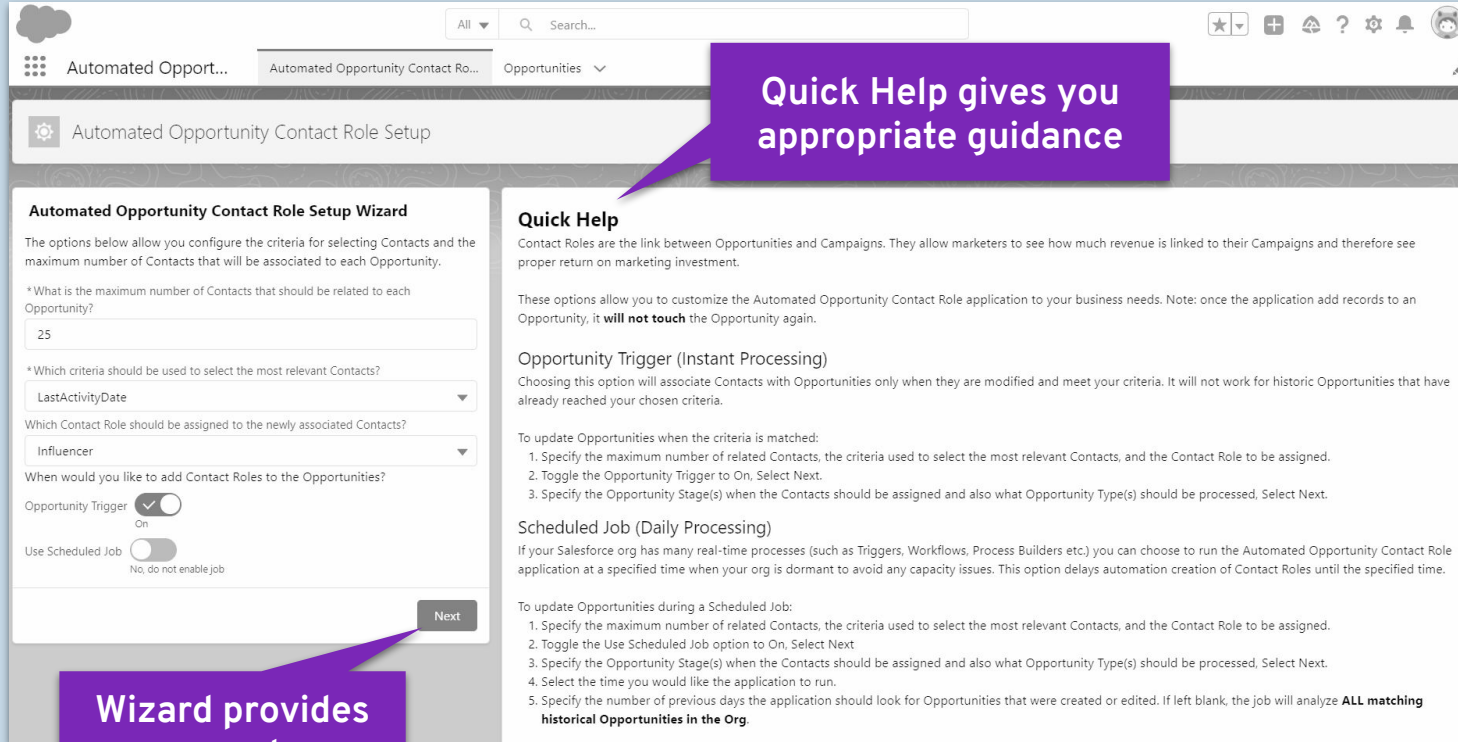
Follow the install
Wizard



The screenshot shows the AppExchange interface for the application "Automated Opportunity Contact Roles" by Sercante Labs. The page includes a search bar at the top, a navigation menu on the left with options like "DETAILS", "REVIEWS", and "PROVIDER", and a main content area. The main content area features a dark grey banner with the heading "THE PROBLEM" and a diagram showing "CONTACT" nodes connected to an "OPPORTUNITIES" node. The pricing is listed as "\$5 USD per user per month" with a note "Discounted for Nonprofits". The description states: "Marketers want to show what campaigns drive revenue. Sounds simple, right? But not always as easy as it seems. Accurate Campaign Influence & attribution reporting depend on Contact Roles linked to Opportunities...and that's where this app comes in."



Once installed, go to the App Launcher and search Automated Opportunity Contact Role



The screenshot shows a web interface for setting up an Automated Opportunity Contact Role. The main content is divided into two columns. The left column contains the 'Automated Opportunity Contact Role Setup Wizard' with several configuration steps: setting the maximum number of contacts (25), selecting criteria (LastActivityDate), choosing a contact role (Influencer), and toggling the 'Opportunity Trigger' (On) and 'Use Scheduled Job' (Off) options. A 'Next' button is at the bottom right of the wizard. The right column contains a 'Quick Help' section with detailed instructions for both 'Instant Processing' and 'Scheduled Job' options. Two purple callout boxes highlight the 'Quick Help' section and the 'Next' button.

Quick Help gives you appropriate guidance

Wizard provides easy setup

Automated Opportunity Contact Role Setup Wizard

The options below allow you configure the criteria for selecting Contacts and the maximum number of Contacts that will be associated to each Opportunity.

*What is the maximum number of Contacts that should be related to each Opportunity?

25

*Which criteria should be used to select the most relevant Contacts?

LastActivityDate

Which Contact Role should be assigned to the newly associated Contacts?

Influencer

When would you like to add Contact Roles to the Opportunities?

Opportunity Trigger On

Use Scheduled Job No, do not enable job

Next

Quick Help

Contact Roles are the link between Opportunities and Campaigns. They allow marketers to see how much revenue is linked to their Campaigns and therefore see proper return on marketing investment.

These options allow you to customize the Automated Opportunity Contact Role application to your business needs. Note: once the application add records to an Opportunity, it **will not touch** the Opportunity again.

Opportunity Trigger (Instant Processing)

Choosing this option will associate Contacts with Opportunities only when they are modified and meet your criteria. It will not work for historic Opportunities that have already reached your chosen criteria.

To update Opportunities when the criteria is matched:

1. Specify the maximum number of related Contacts, the criteria used to select the most relevant Contacts, and the Contact Role to be assigned.
2. Toggle the Opportunity Trigger to On. Select Next.
3. Specify the Opportunity Stage(s) when the Contacts should be assigned and also what Opportunity Type(s) should be processed, Select Next.

Scheduled Job (Daily Processing)

If your Salesforce org has many real-time processes (such as Triggers, Workflows, Process Builders etc.) you can choose to run the Automated Opportunity Contact Role application at a specified time when your org is dormant to avoid any capacity issues. This option delays automation creation of Contact Roles until the specified time.

To update Opportunities during a Scheduled Job:

1. Specify the maximum number of related Contacts, the criteria used to select the most relevant Contacts, and the Contact Role to be assigned.
2. Toggle the Use Scheduled Job option to On. Select Next
3. Specify the Opportunity Stage(s) when the Contacts should be assigned and also what Opportunity Type(s) should be processed, Select Next.
4. Select the time you would like the application to run.
5. Specify the number of previous days the application should look for Opportunities that were created or edited. If left blank, the job will analyze **ALL matching historical Opportunities in the Org**.

Next, choose your settings.

Automated Opportunity Contact Role Setup Wizard

The options below allow you configure the criteria for selecting Contacts and the maximum number of Contacts that will be associated to each Opportunity.

*What is the maximum number of Contacts that should be related to each Opportunity?

*Which criteria should be used to select the most relevant Contacts?

Which Contact Role should be assigned to the newly associated Contacts?

When would you like to add Contact Roles to the Opportunities?

Opportunity Trigger On

Use Scheduled Job No, do not enable job

Next

Automated Opportunity Contact Role Setup Wizard

*Select the Opportunity Stage(s) that trigger Contact auto-association with the Opportunity.

Available

- Prospecting
- Qualification
- Needs Analysis
- Closed Lost

Selected

- Id. Decision Makers
- Value Proposition
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review

Select the Opportunity Type(s) that should be processed automatically.

Excluded

- New Customer

Processed

- Existing Customer - Upgrade
- Existing Customer - Replacem...
- Existing Customer - Downgrade

Previous Next

Choose the Opportunity stages and types that should have Contact Roles.

See how it works

1.

The screenshot shows the CRM interface for an account named "Lumber Inc". The account owner is Jen Kazin. Below the account details, there is a "Related" section with tabs for "Details" and "News". A message states: "We found no potential duplicates of this Account." Under the "Contacts (1)" section, a contact named Bob Frank is listed with fields for Title, Email, and Phone. A purple callout box points to the contact with the text "Contact on an account".

2.

The screenshot shows the "New Opportunity" form. The form is titled "New Opportunity" and contains several fields for creating a new opportunity. A purple callout box points to the form with the text "Sales person creates an opportunity".

Opportunity Information

Opportunity Owner: Jen Kazin

Amount: [Text Field]

Private:

* Close Date: 9/30/2022

* Opportunity Name: Lumber Opportunity Q1

Next Step: [Text Field]

Account Name: Lumber Inc

* Stage: Prospecting

Type: --None--

Probability (%): 10%

Lead Source: [Text Field]

Primary Campaign Source: Search Campaigns...

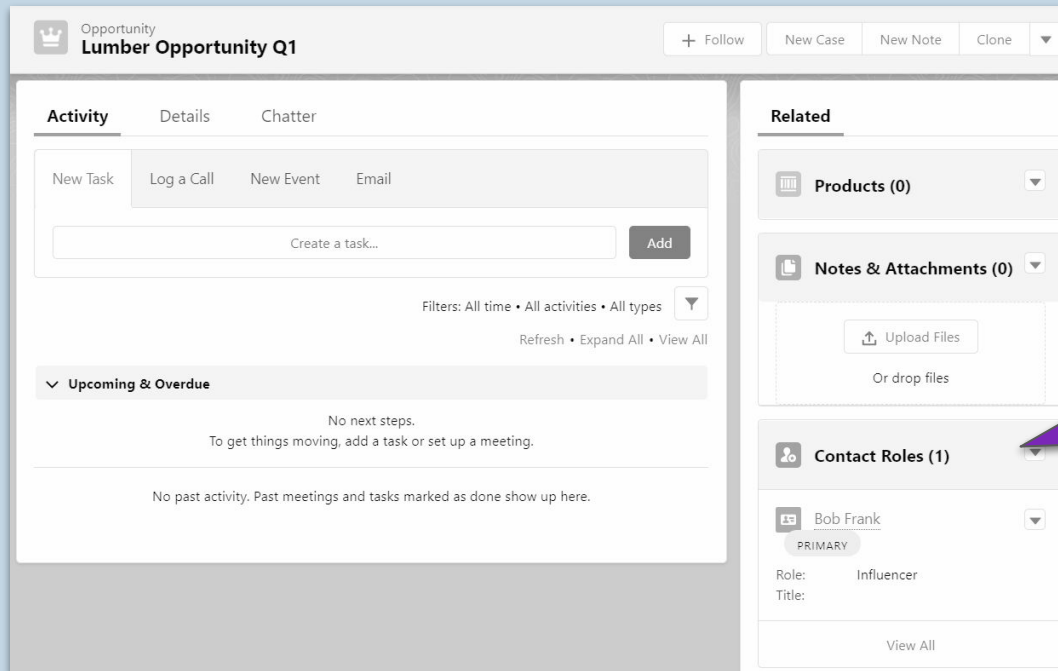
Main Competitor(s): [Text Field]

Delivery/Installation Status: --None--

Buttons: Cancel, Save & New, Save

See how it works

3.



Opportunity
Lumber Opportunity Q1

+ Follow New Case New Note Clone ▾

Activity Details Chatter

New Task Log a Call New Event Email

Create a task... Add

Filters: All time • All activities • All types ▾

Refresh • Expand All • View All

▼ **Upcoming & Overdue**

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Related

Products (0) ▾

Notes & Attachments (0) ▾

Upload Files

Or drop files

Contact Roles (1) ▾

Bob Frank

PRIMARY

Role: Influencer

Title:

View All

Contact Role is created!



#2

Salesforce Flow

What is a Flow?

Flow is an automation tool provided by Salesforce which can be used to perform various processes such as, sending an email, updating a field or creating and deleting records.

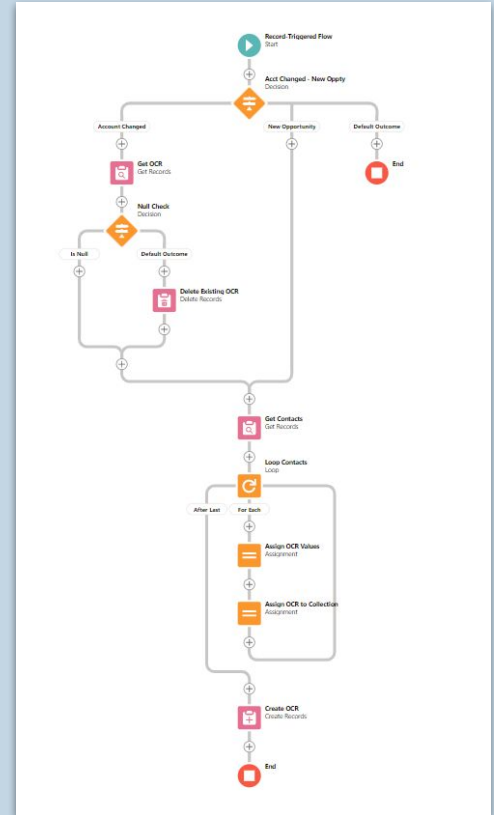
Flows let you complete complex business requirements without the help of a Salesforce developer.

How to add Contact Roles on Opportunity

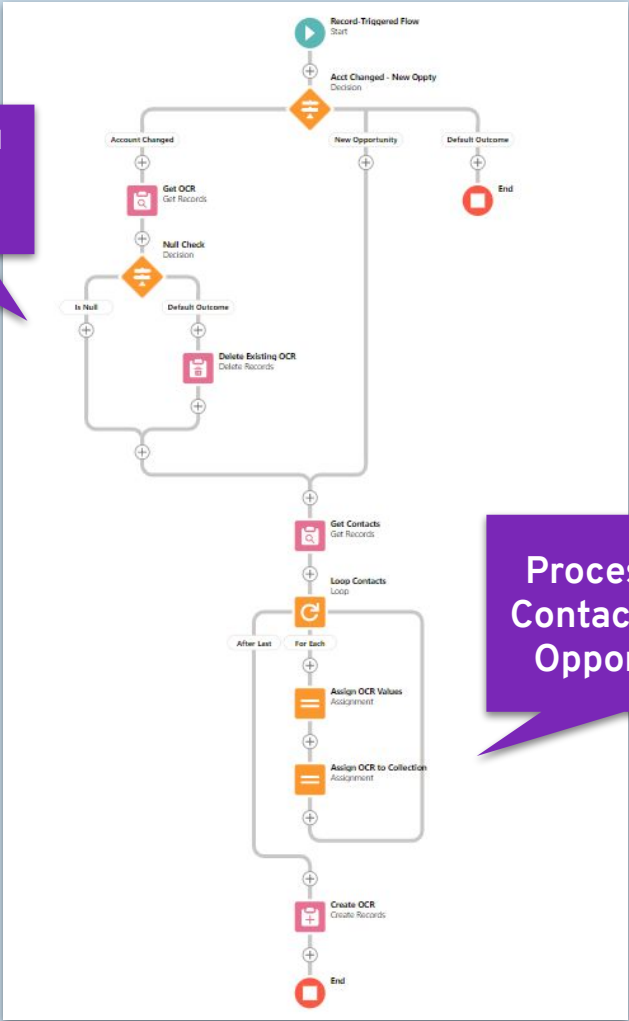
Some administrators are less familiar with Flows, but once set up, Contact Roles populate automatically.



Source: Sofia Davis-Kos



Process if you
change the
Account



Process to add
Contact Roles to
Opportunities

This is a record-triggered Flow.

Triggers when an opportunity is created and when an Account is changed.



Edit Decision

Acct Changed - New Oppty (Acct_Changed_New_Oppty)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

OUTCOME DETAILS

Delete Outcome

Account Changed

New Opportunity

Default Outcome

*Label

Account Changed

*Outcome API Name

Account_Changed

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

Aa \$Record > Account ID

Operator

Does Not Equal

Value

Aa \$Record_Prior > Account ID

+ Add Condition

When to Execute Outcome

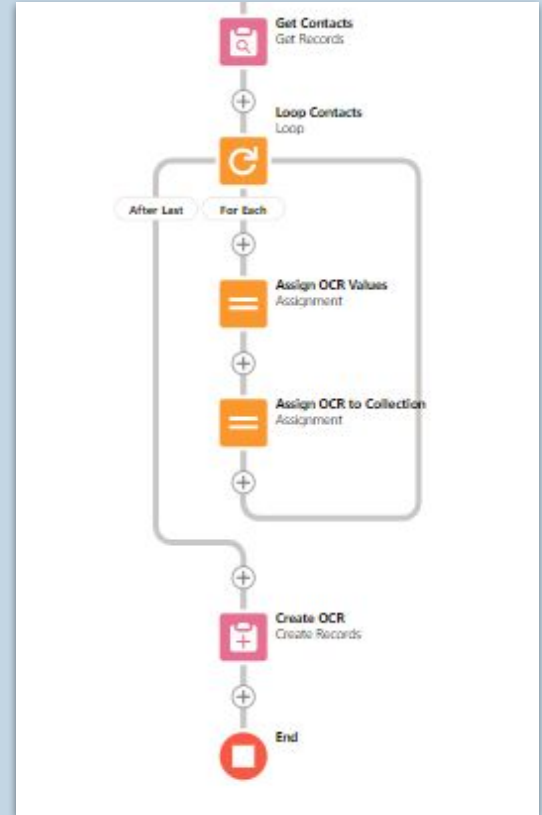
- If the condition requirements are met
- Only if the record that triggered the flow to run is updated to meet the condition requirements

Cancel

Done

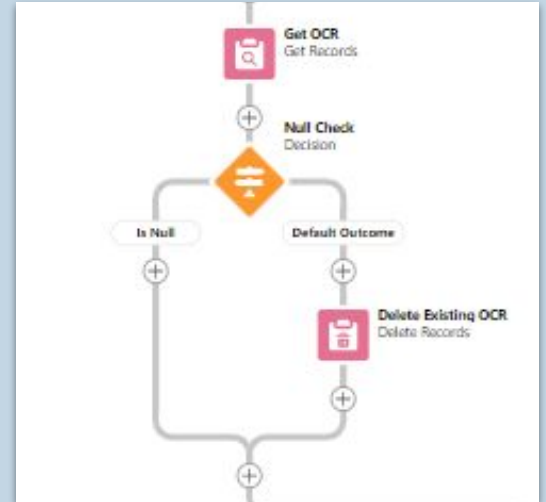
This portion of the Flow is doing most of the work.

It pulls all the Contacts from the Account and creates the Contact Role.



Here, the Flow is triggered if a user changes the Account on the Opportunity.

This portion will delete any Contact Roles from the Opportunity.



Blueprints to create Contact Role Flow

bit.ly.xxxx

(link still needs to be created)

Compare the two recommendations

	AppExchange	Flow
POSITIVES	Easier to set up	No cost
DRAWBACKS	Cost per month per sales person (can get heavy bulk discounts!)	Fairly complex Flow to create, especially if you are a beginner

Want to learn more about Flows?

Trailhead

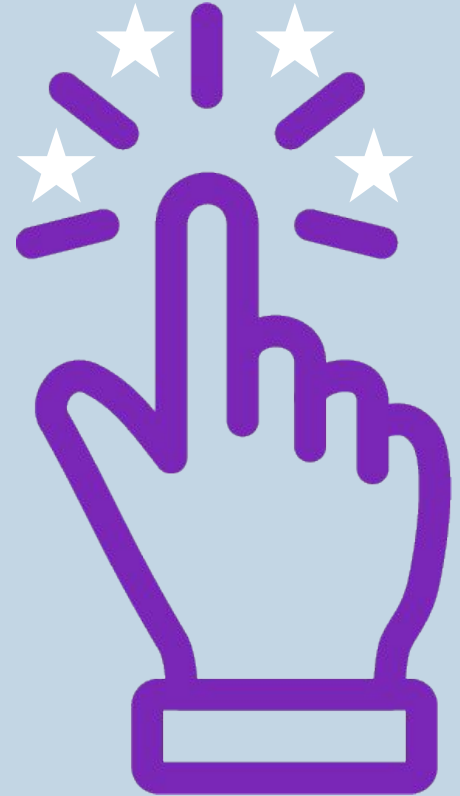
<https://trailhead.salesforce.com/en/content/learn/modules/flow-basics/get-started-with-flows>

Flow Builder Training

<https://www.apexhours.com/salesforce-flow-builder-training/>

Erin's success came from one key thing...

Erin showed the touch points between leads and won opportunities.



Now here's Erin...

- She was just promoted
- She's hiring a new employee
- Upper management now listens to her ideas
- She uses data to show where they are getting sales and from whom



Thank You!



Jen Kazin



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