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

Advanced | Admin

Jen Kazin
Greenkey

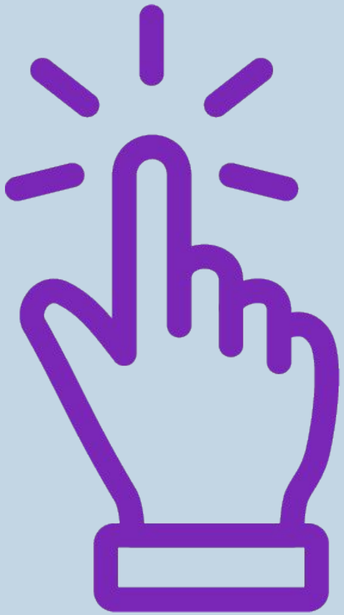
Talking points

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.



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Here's what she showed management...

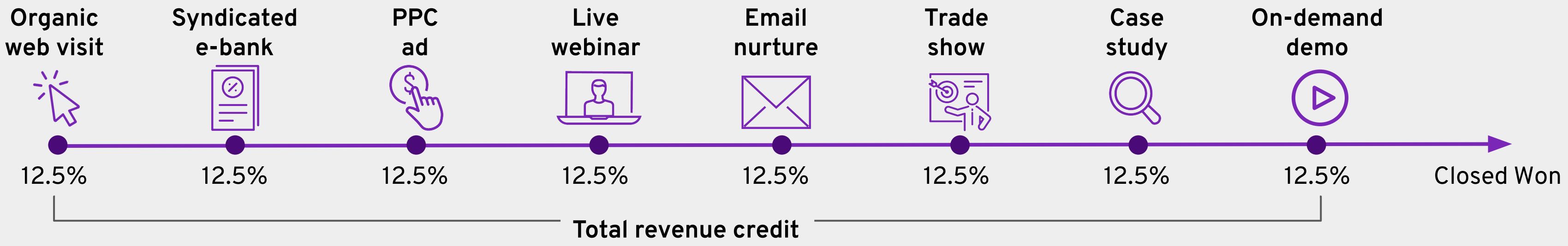
Report: Campaigns with Influenced Opportunities (Customizable Campaign Influence)

Campaign Influence

Campaign Type ↑	Opportunities in Campaign	Responded	Contact Name	Primary Campaign Source	Opportunity Name	Opportunity Amount
ABM (1)	1	☑	[illegible]	☐	[illegible]	$15,089.50
Advertising (1)	1	☑	[illegible]	☐	[illegible]	$15,058.00
Content (1001)	601	☑	[illegible]	☐	[illegible]	$17,334.00
	601	☑	[illegible]	☐	[illegible]	$1,125.00
	601	☑	[illegible]	☐	[illegible]	$41,520.00
	601	☑	[illegible]	☐	[illegible]	$2,250.00
	601	☑	[illegible]	☐	[illegible]	$46,010.00
	601	☑	[illegible]	☐	[illegible]	-
	601	☑	[illegible]	☐	[illegible]	$14,000.00
	601	☑	[illegible]	☐	[illegible]	$30,000.00
	601	☑	[illegible]	☐	[illegible]	$14,300.00
	601	☑	[illegible]	☑	[illegible]	$16,500.00
	1	☑	[illegible]	☐	[illegible]	$27,500.00
	601	☑	[illegible]	☐	[illegible]	$15,840.00
	13	☑	[illegible]	☐	[illegible]	$90,000.00
	19	☑	[illegible]	☐	[illegible]	$90,000.00
	20	☑	[illegible]	☐	[illegible]	$90,000.00
	601	☑	[illegible]	☐	[illegible]	$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.



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Learn more about Campaign Influence

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But here's the catch...

Campaign Influence doesn't work without contact roles.

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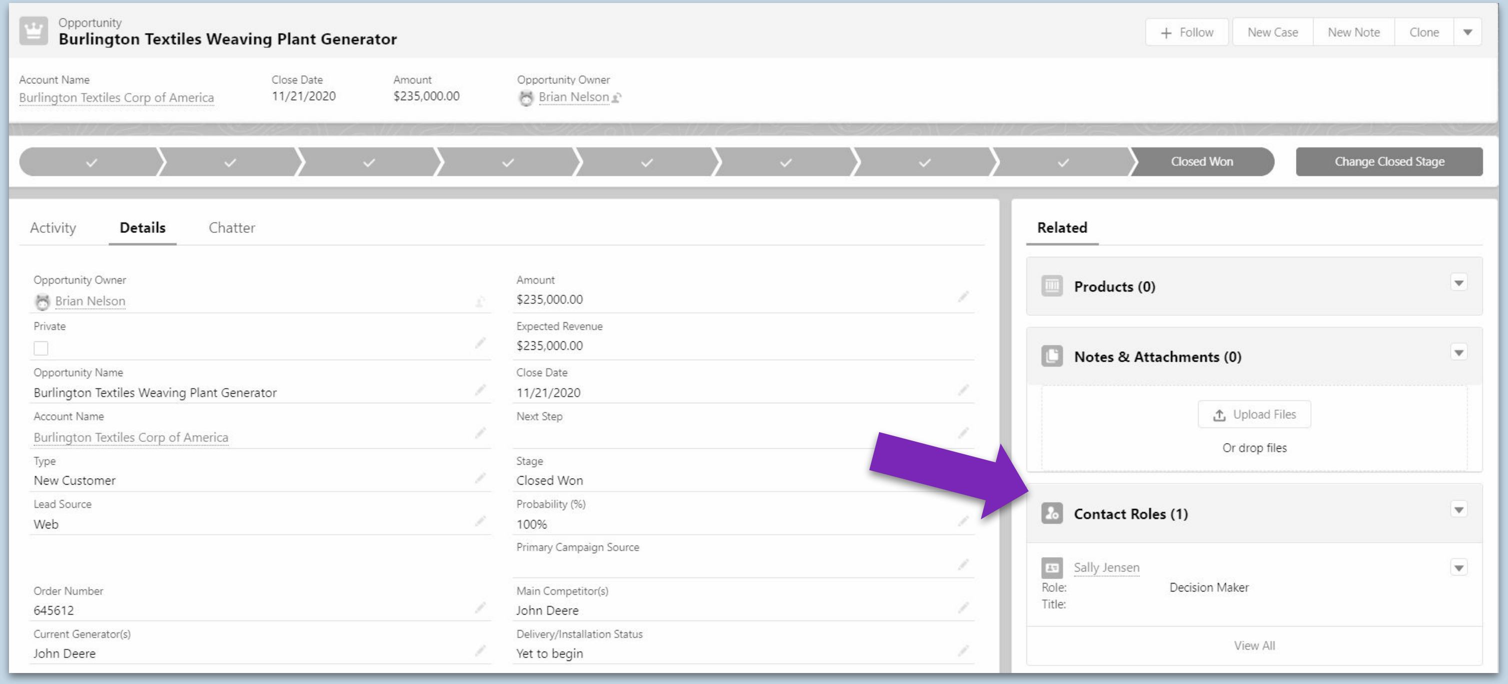
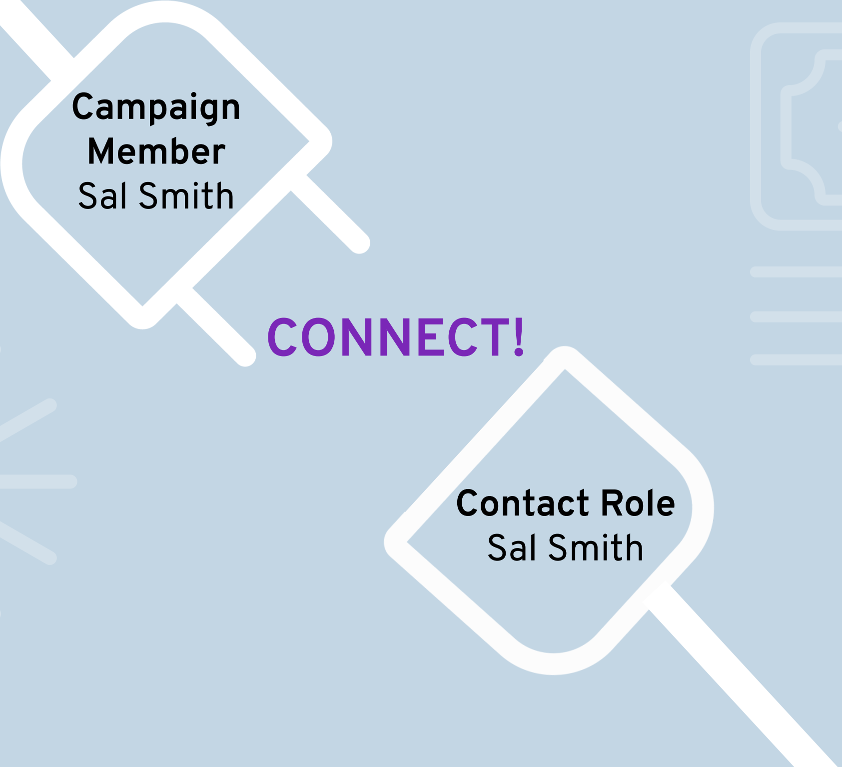
What's a Contact Role?



Campaign Influence needs…



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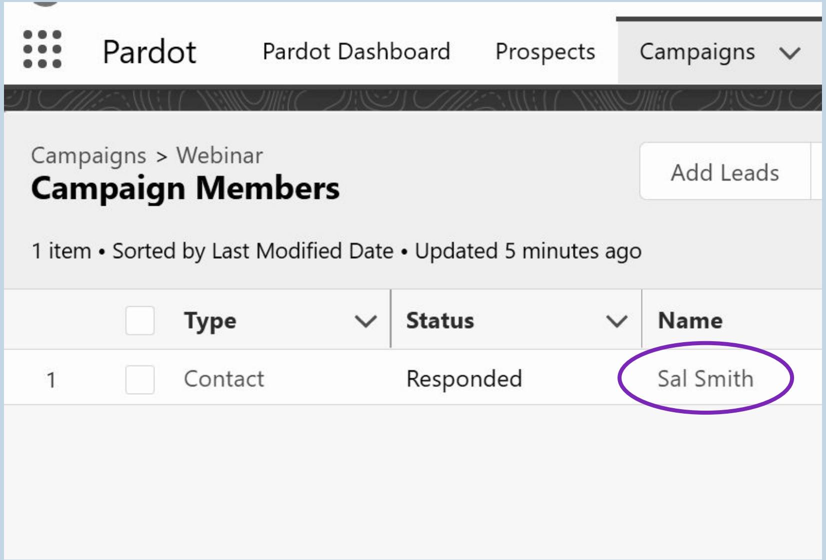
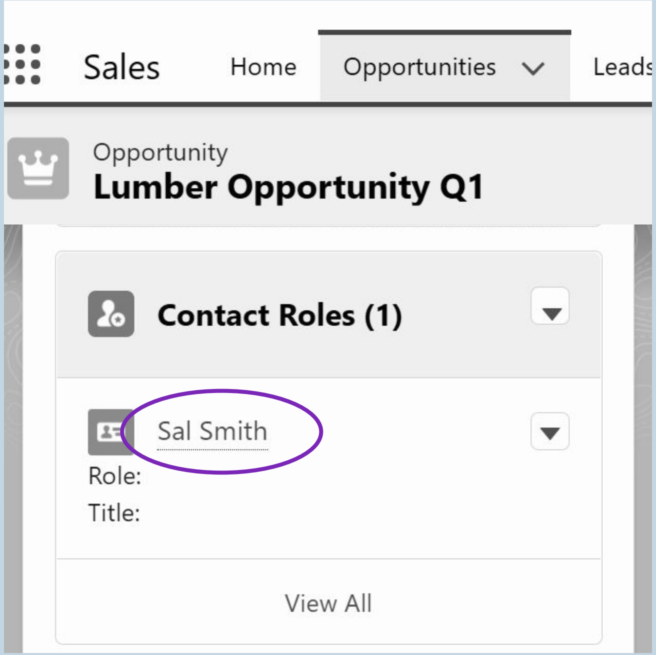
CAMPAIGN



OPPORTUNITY



How many companies are effective at adding contact roles?

Companies **WITHOUT** Contact Roles	Companies **WITH** Contact Roles
	

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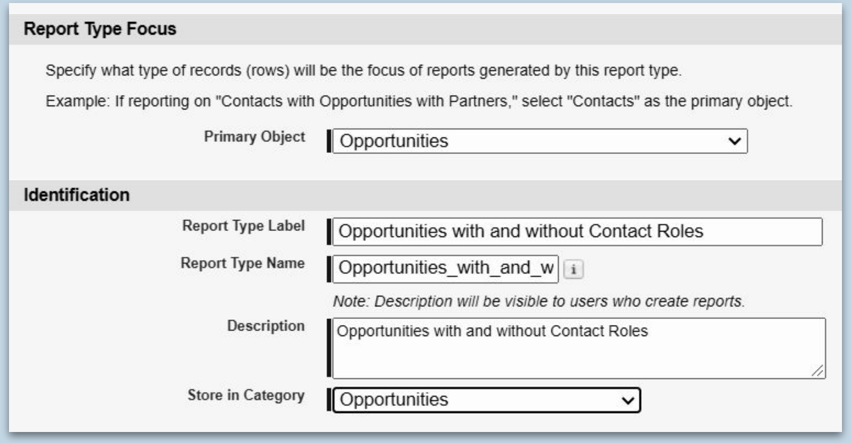
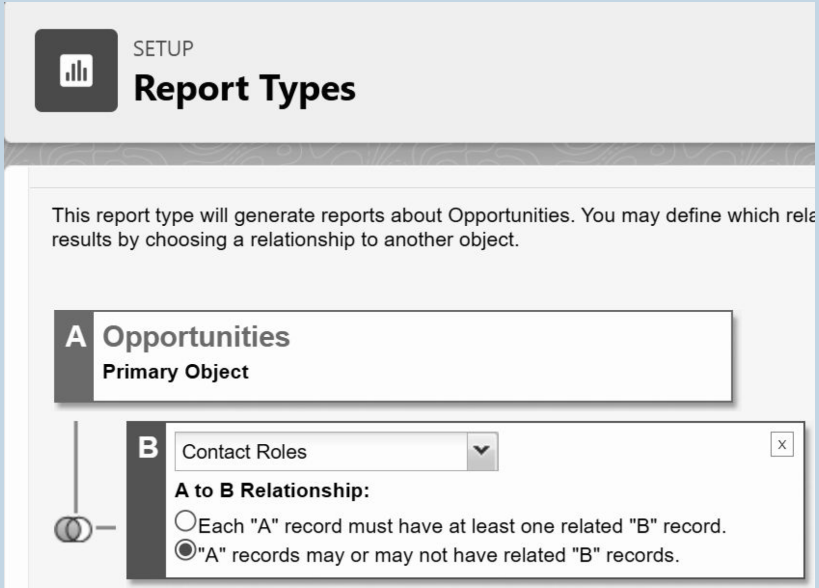
Check your Contact Roles

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



3.



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Report: Opportunities with and without Contact Roles

New Report

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

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

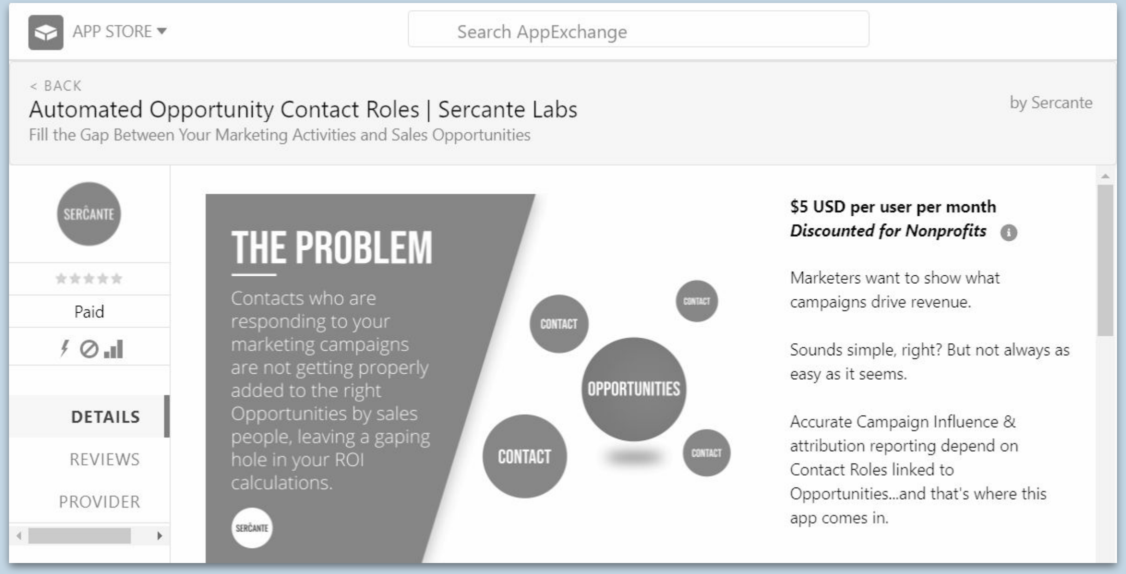
Automated Opportunity Contact Roles

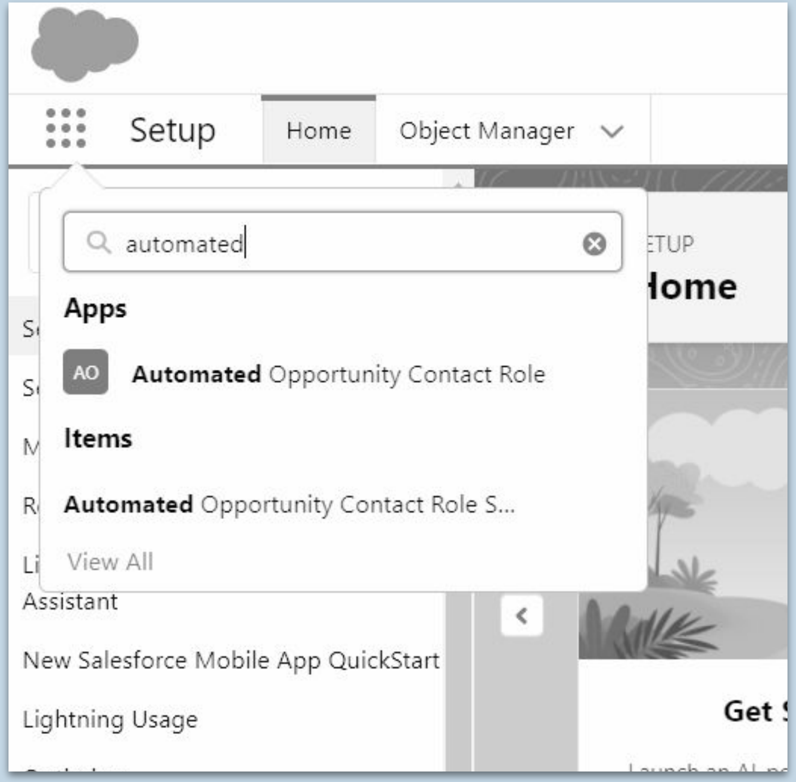
Go to

Setup > AppExchange

Choose "Automated Opportunity Contact Roles"

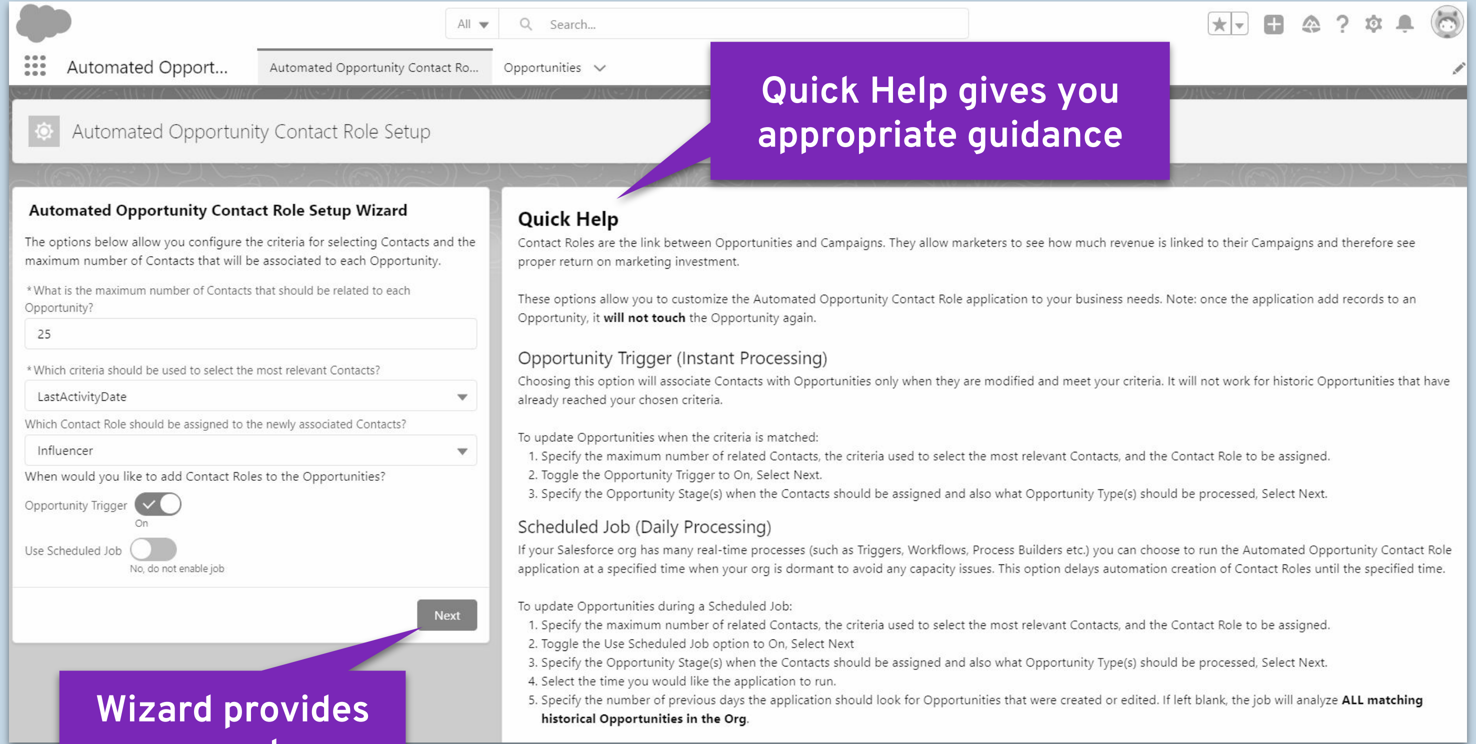
Follow the install Wizard





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

Quick Help gives you appropriate guidance



Wizard provides easy setup

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?

25

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

LastActivityDate

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

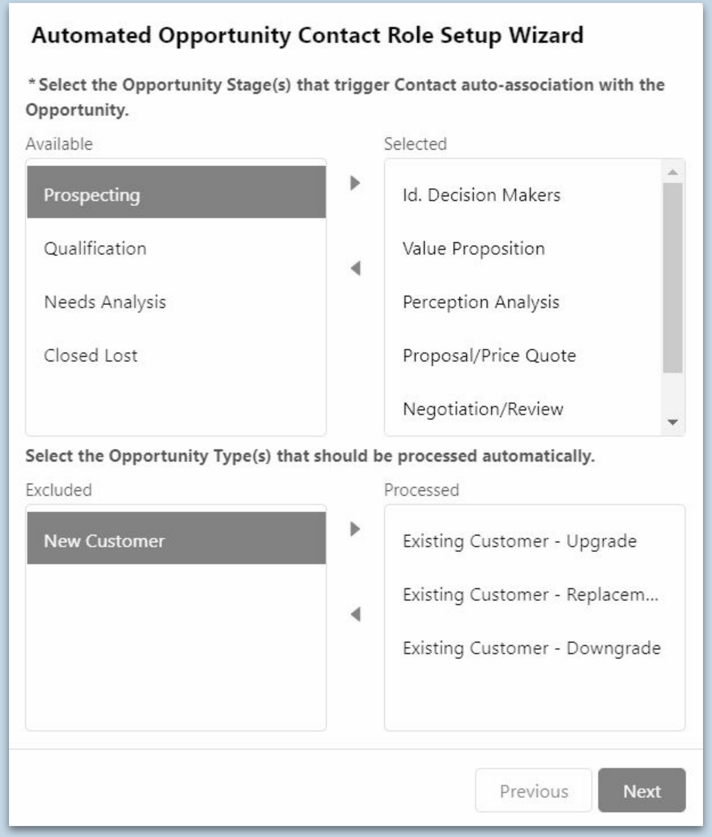
Influencer

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

Opportunity Trigger
On

Use Scheduled Job
No, do not enable job

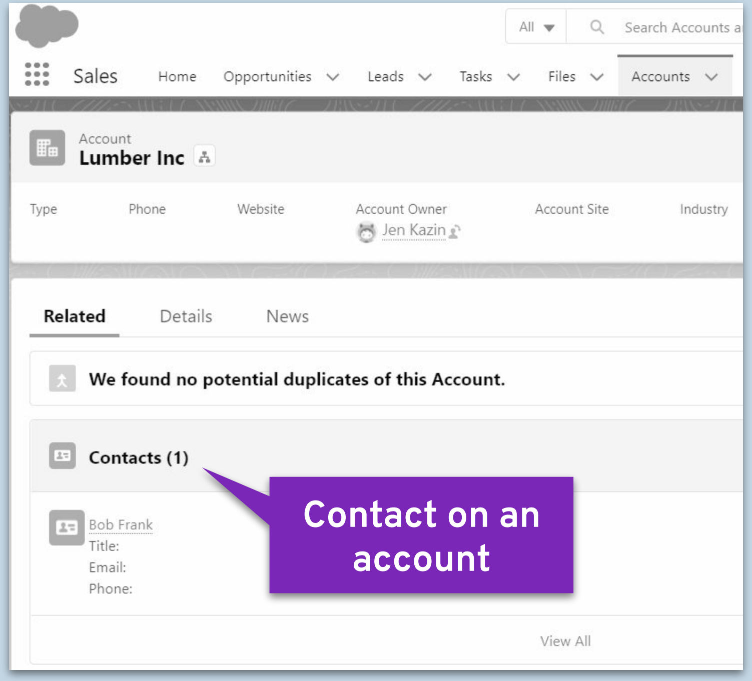
Next



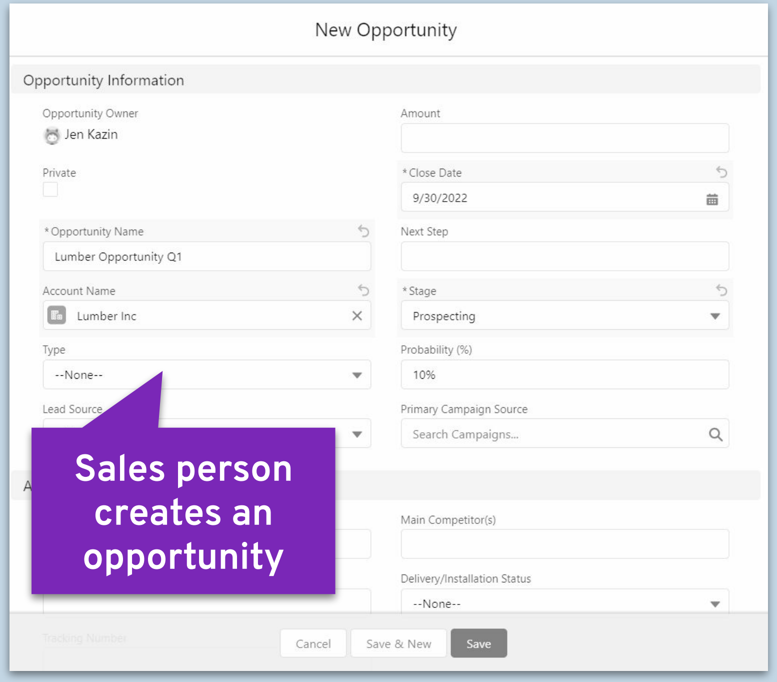
Choose the Opportunity stages and types that should have Contact Roles.

See how it works

1.

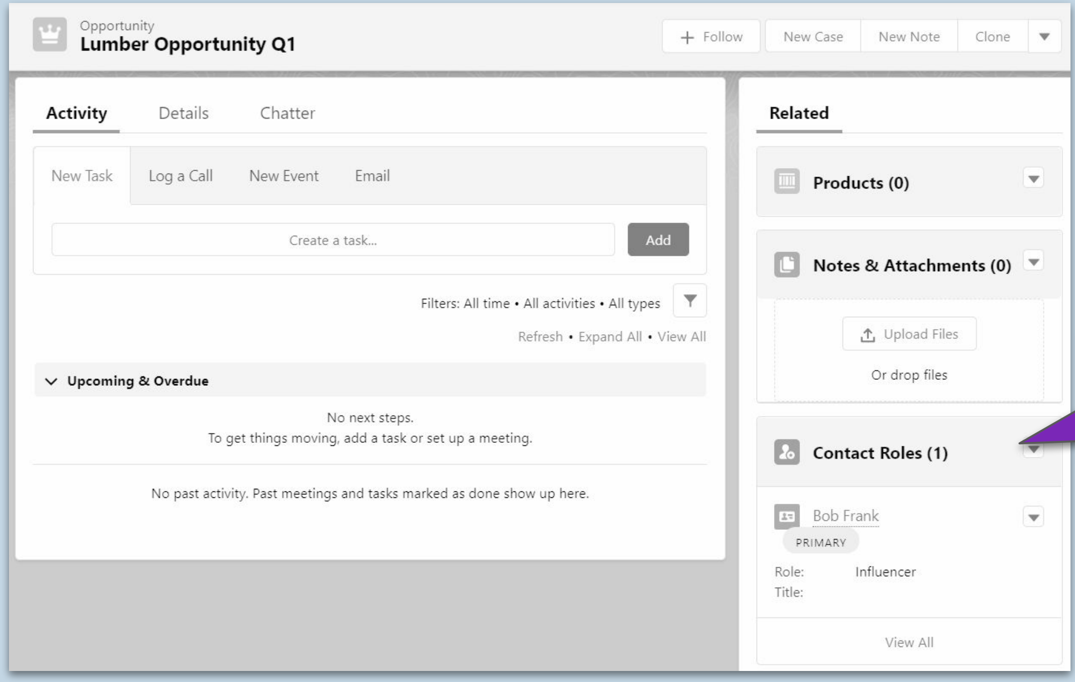


2.



See how it works

3.



Contact Role is created!

#2

Salesforce Flow

What is a Flow?

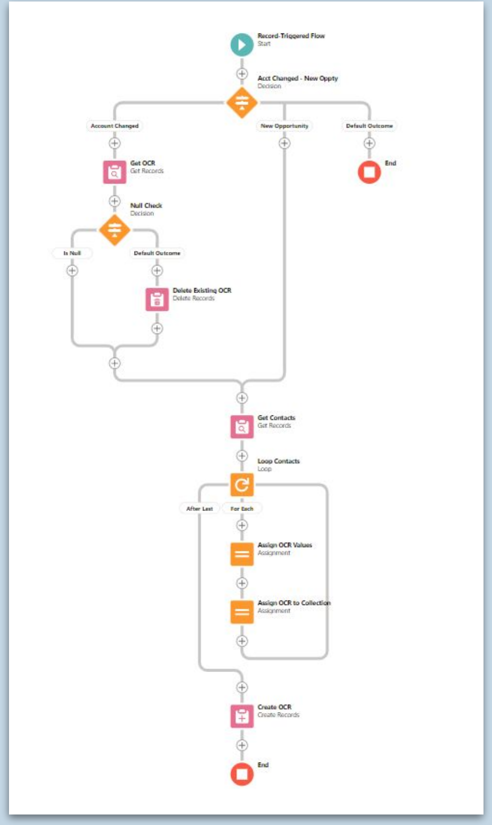
Flow is an automation tool provided by Salesforce which can be used to perform various processes such as, sending an email, updating a field or creating and deleting records.

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



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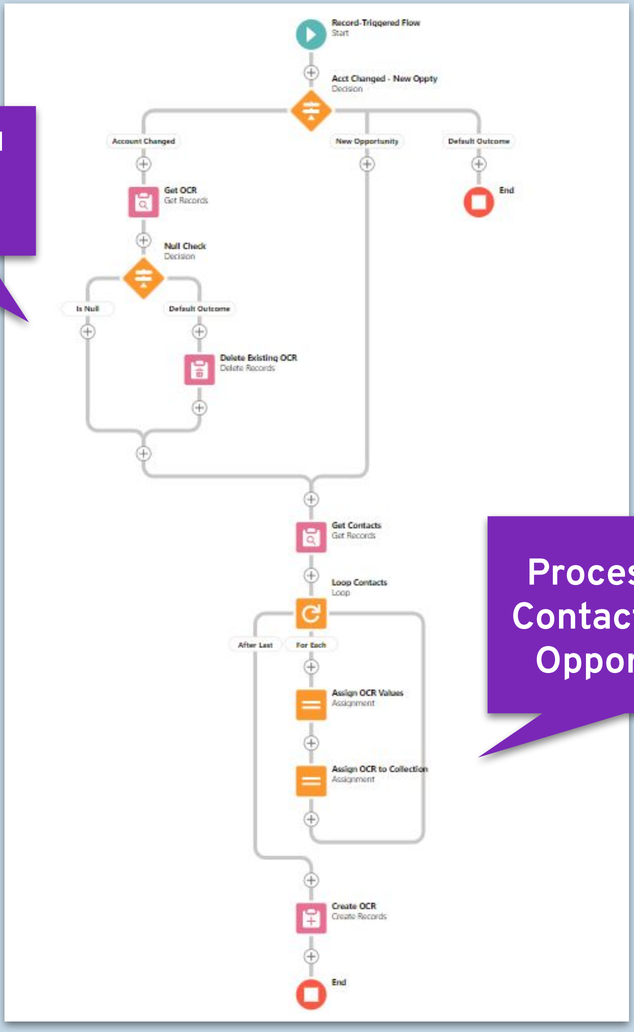
Process if you change the Account



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.

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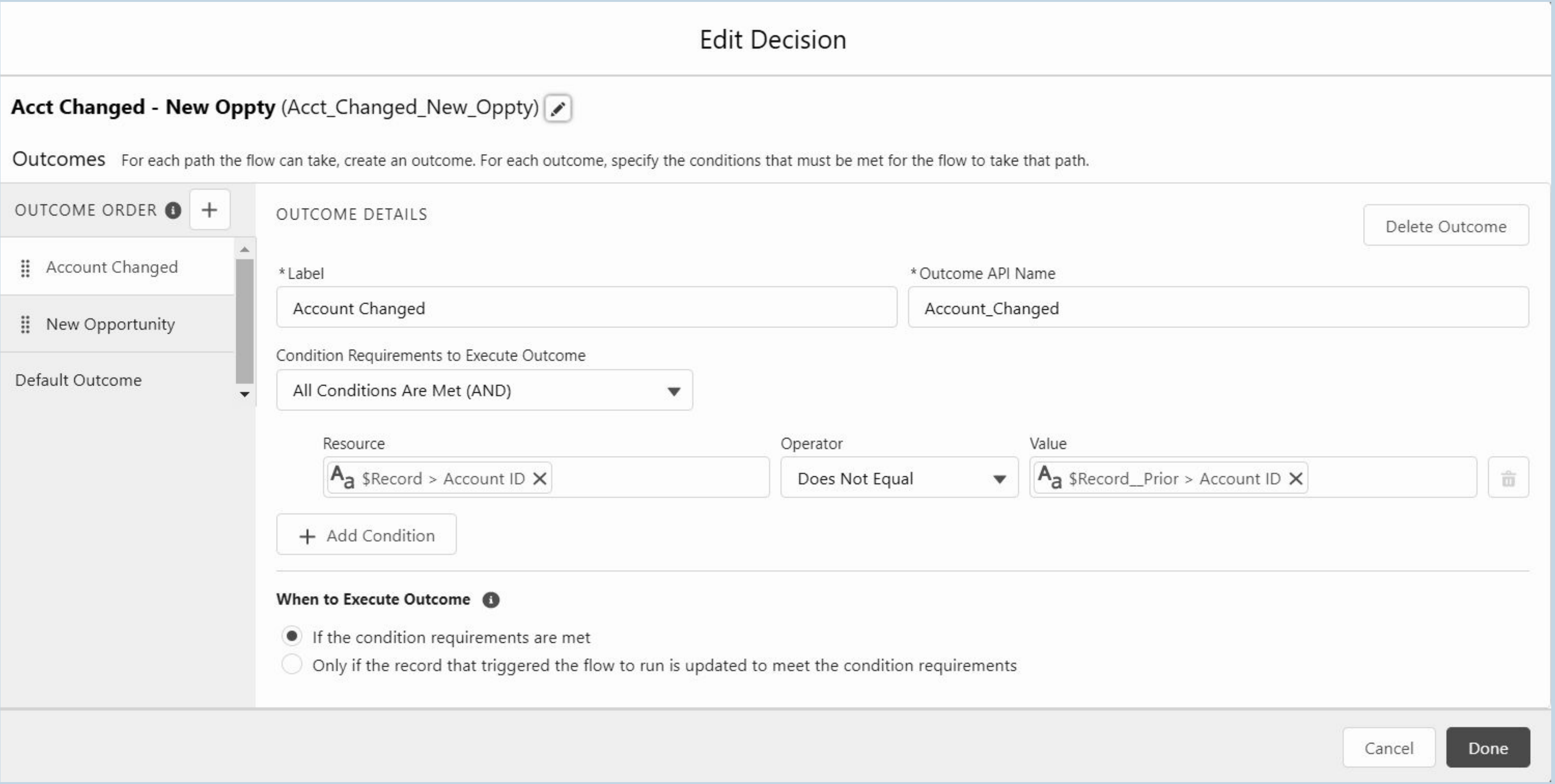
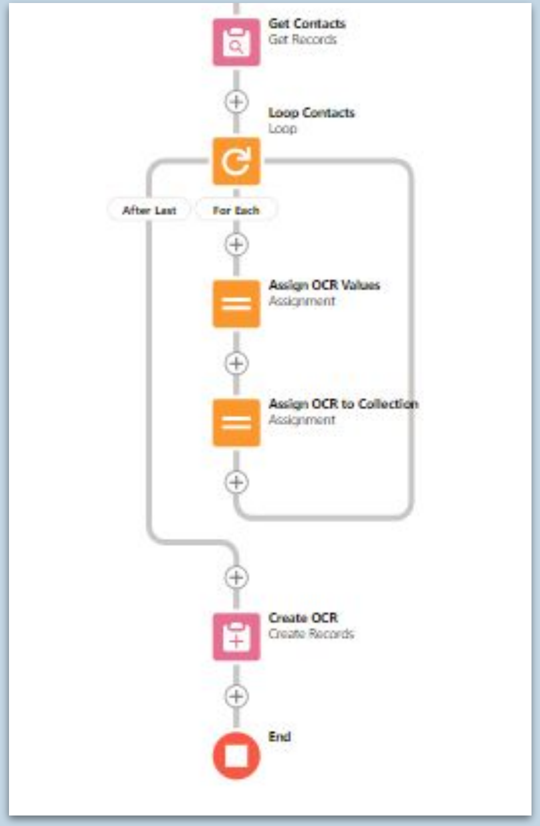


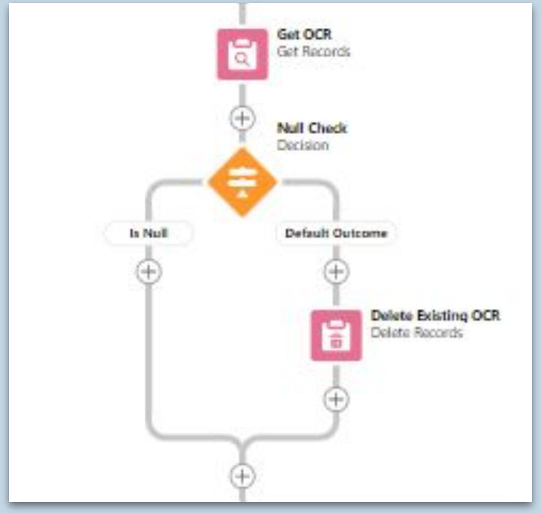
This portion of the Flow is doing most of the work.

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

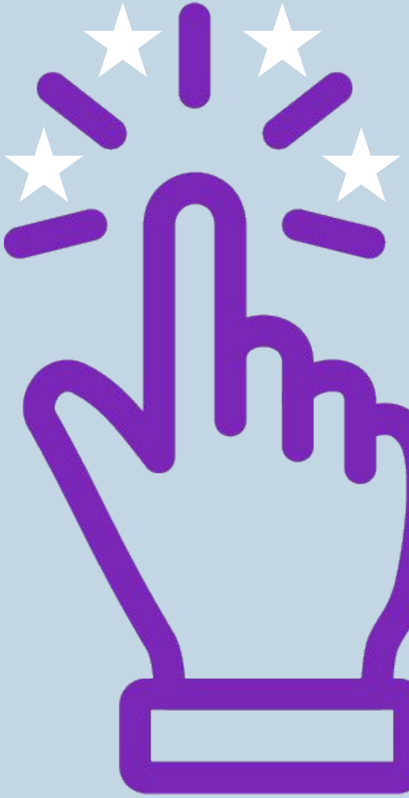
https://trailhead.salesforce.com/en/content/learn/modules/flow-basics/get-started-with-flows

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

@jenkazin

jen.kazin@greenkeyditigal.com

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