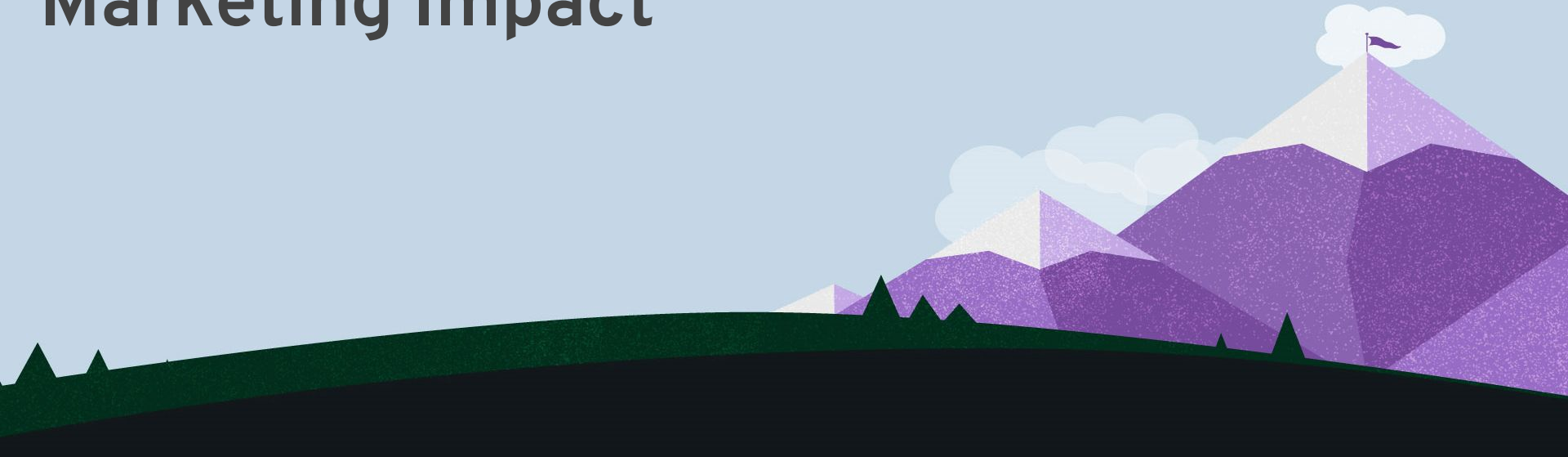



Salesforce Campaigns: The Strategy Behind the Tool to Boost your Marketing Impact



#6 Tips for a successful Salesforce Campaigns Implementation

 Beginner | Strategy



Ivo Campos
IVICUO



Julien Hennico
IVICUO



When talking
about
‘Campaigns’
we could feel a
little...



Connected

Campaigns

Conversion
points

Marketing

Distribution

Campaign
Influence

Members

Engagement

History

Engagement
Dashboard

Campaigns

Members



But we are
here to share
our
experience

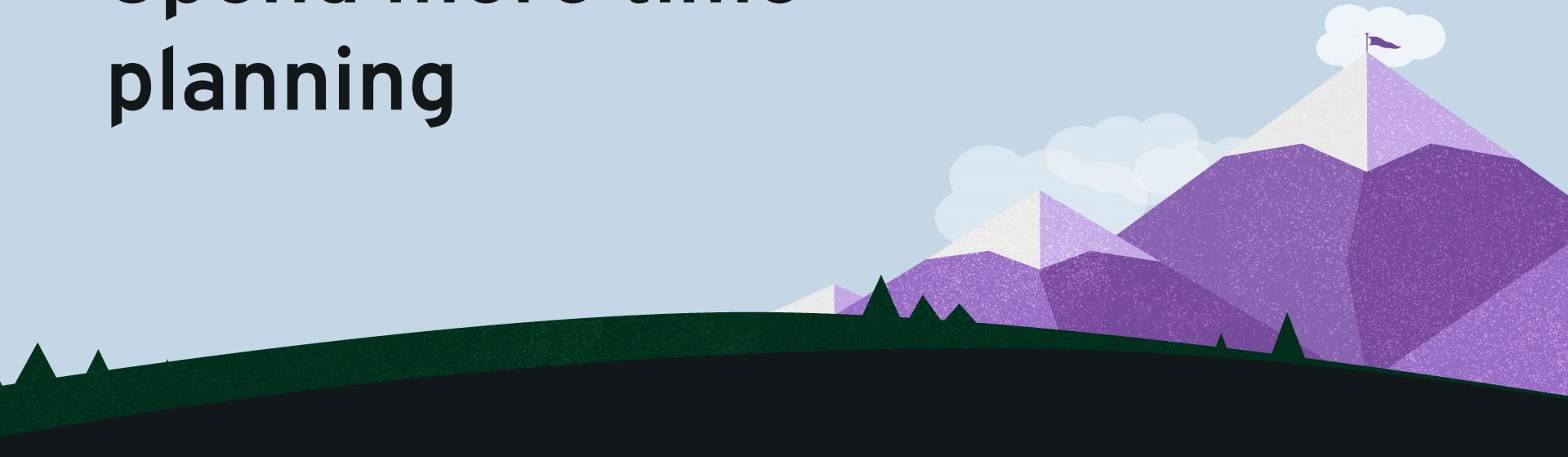


#6 CAMPAIGN TIPS

Tip #1

--

Spend more time planning




REPORTING

TRACK LEAD
ENGAGEMENT

CAMPAIGN STRUCTURE

 Lack of alignment on stakeholders

 Lead engagement not tracked so not measured

 Bad reporting, not useful to make decisions

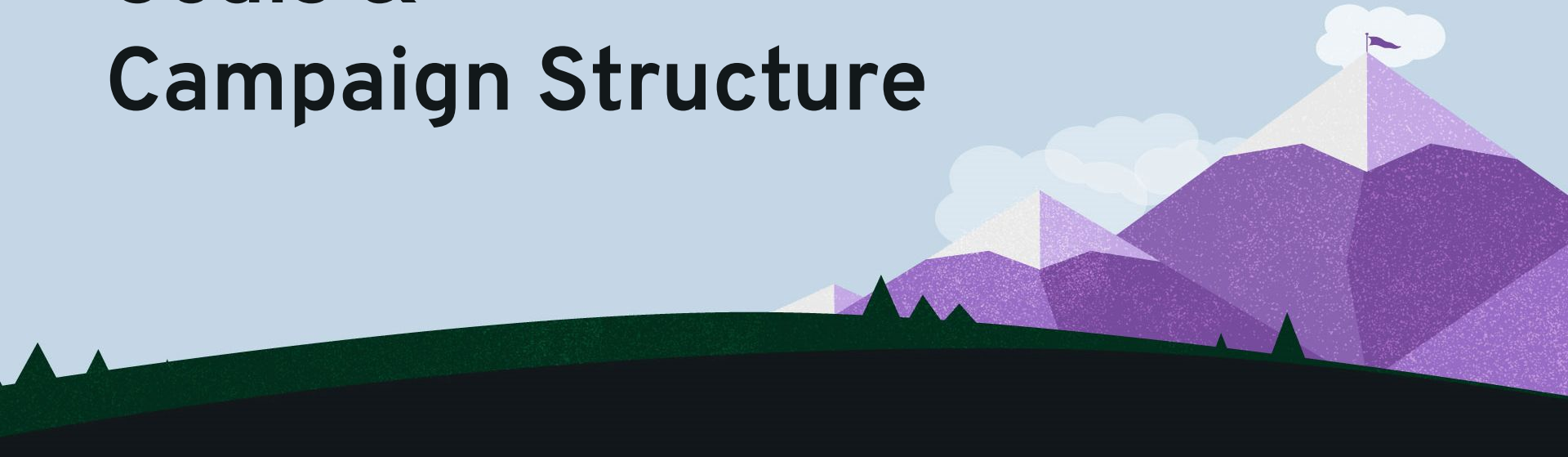
- REPORTING
- TRACK LEAD ENGAGEMENT
- CAMPAIGN STRUCTURE

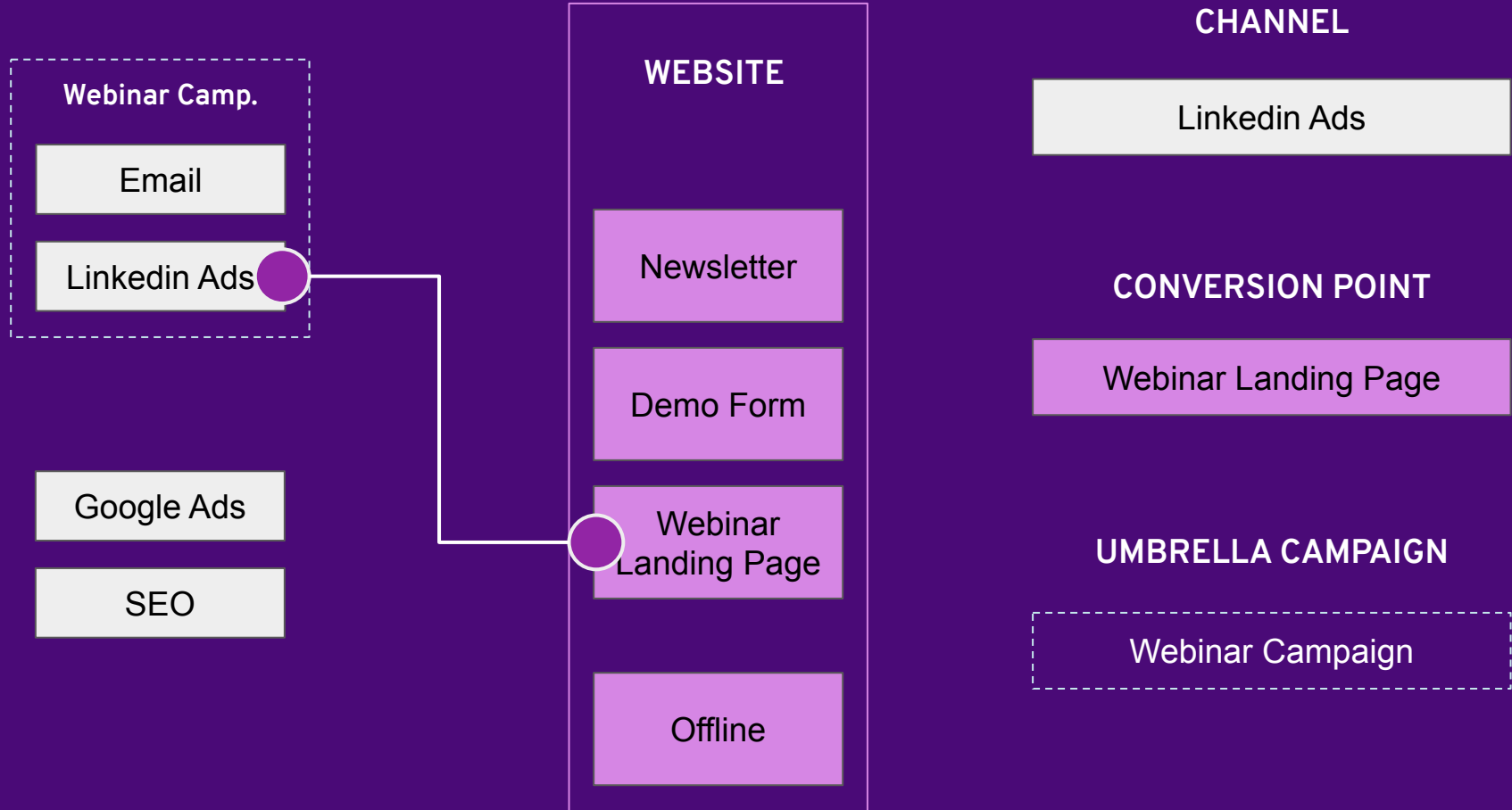


Tip #2

--

Goals & Campaign Structure





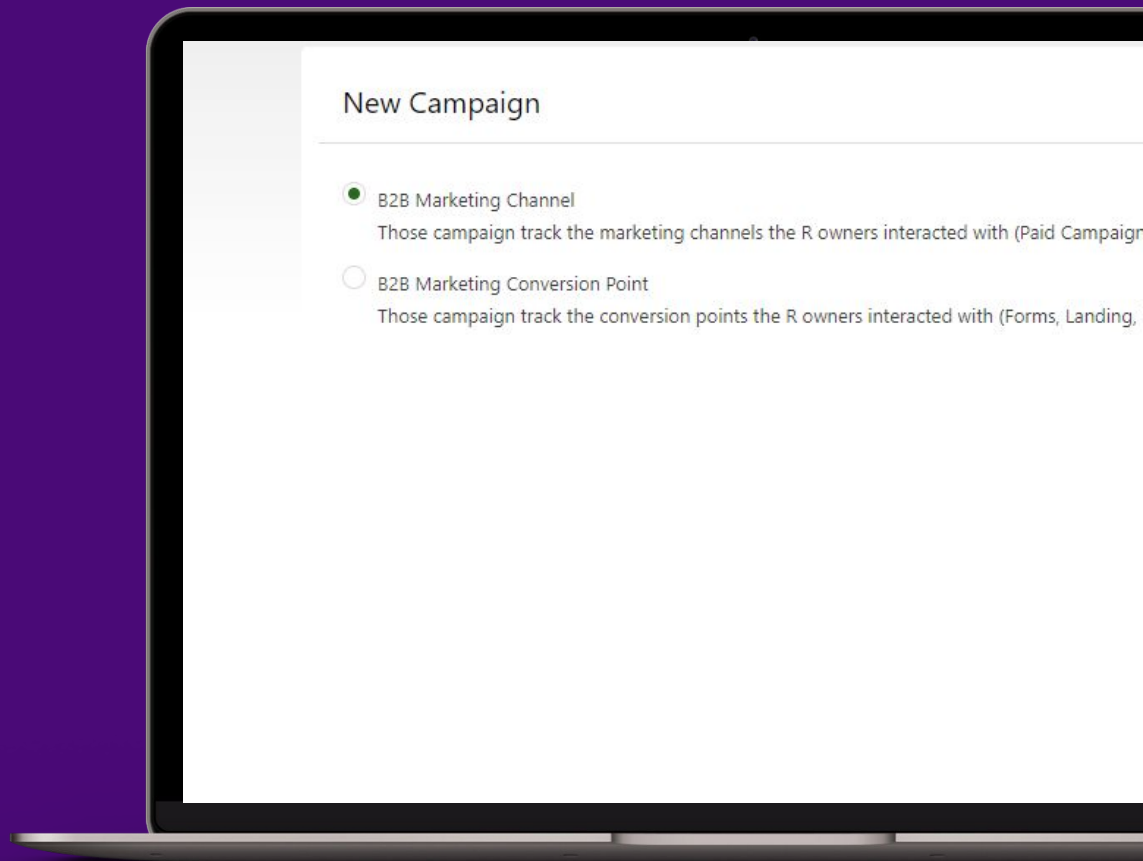
CHANNELS

CONVERSION
POINT

UMBRELLA
CAMPAIGN



Use Record Type



○ Use Record Type

○ Use Custom Fields for filters

Campaign	Record Type	Channel	Sub Channel	Country
Always_Paid_Adwords_Brand	Channel	Paid	Adwords	Global
Always_Paid_Adwords_Product	Channel	Paid	Adwords	Global
202107_Email_WebinarAllAboutMyProduct	Channel	Email	Leadgen	FR
202107_Paid_Facebook_WebinarAllAboutMyProduct	Channel	Paid	Facebook	FR
202107_Partnership_WebinarAllAboutMyProduct	Channel	Partnership		FR
202108_Email_LeadGen_ProductLaunch	Channel	Email	LeadGen	ES
202107_Email_Newsletter	Channel	Email	Newsletter	ES
Website_DemoForm	Conversion Point			
Website_NewsletterForm	Conversion Point			
Website_WebinarForm	Conversion Point			

- Use Record Type
- Use Custom Fields for filters
- Use the Date fields of Campaign and Campaign Members

The screenshot shows a web form titled "New Campaign: B2B Marketing Channel". The form is divided into several sections:

- Campaign Information:** Contains fields for Campaign Name, Parent Campaign (with a search box), Channel, Sub Channel, Country, and Target. A green box highlights the Channel, Sub Channel, and Country fields, with the text "Custom Fields" overlaid in green.
- Description:** A large text area for entering the campaign description.
- Native Date Fields:** An orange box highlights the Start Date and End Date fields, with the text "Native Date Fields" overlaid in orange.
- Planning:** Contains fields for Active (checkbox), Campaign Currency (dropdown), Campaign Owner (Julien Hennico), Type (dropdown), and Campaign Record Type.

- Use Record Type
- Use Custom Fields for filters
- Use the **Date fields** of Campaign and Campaign Members
- Use **Parent Campaign** for Umbrella Campaign

Campaign	Record Type	Channel	Sub Channel	Country
Always_Paid_Adwords_Brand	Channel	Paid	Adwords	Global
Always_Paid_Adwords_Product	Channel	Paid	Adwords	Global
202107_Email_WebinarAllAboutMyProduct	Channel	Email	Leadgen	FR
202107_Paid_Facebook_WebinarAllAboutMyProduct	Channel	Paid	Facebook	FR
202107_Partnership_WebinarAllAboutMyProduct	Channel	Partnership		FR
202108_Email_LeadGen_ProductLaunch	Channel	Email	LeadGen	ES
202107_Email_Newsletter	Channel	Email	Newsletter	ES
Website_DemoForm	Conversion Point			
Website_NewsletterForm	Conversion Point			
Website_WebinarForm	Conversion Point			

PARENT:
202107_WEBINAR_AllAboutMyProduct

2021 Q3	
Q3_Email	
	202108_Email_LeadGen_ProductLaunch
	202107_Email_LeadGen_Newsletter
Q3_Webinar	
	202107_Webinar_AllAboutMyProduct
	202108_Webinar_Campaigntips
Q3_Adwords	
	Brand_Campaign
	Product_Campaign
Q3_Website	
	Q3_DemoForm
	Q3_TrialForm

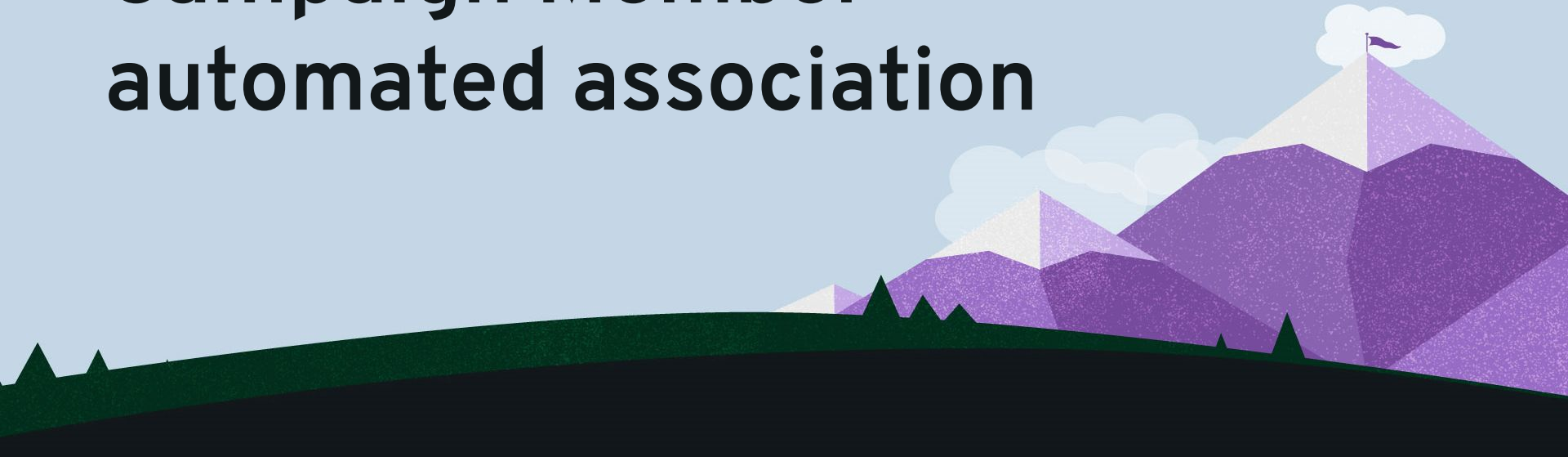


Campaign	Record Type	Channel	Sub Channel	Country
Always_Paid_Adwords_Brand	Channel	Paid	Adwords	Global
Always_Paid_Adwords_Product	Channel	Paid	Adwords	Global
202107_Email_WebinarAllAboutMyProduct	Channel	Email	Leadgen	FR
202107_Paid_Facebook_WebinarAllAboutMyProduct	Channel	Paid	Facebook	FR
202107_Partnership_WebinarAllAboutMyProduct	Channel	Partnership		FR
202108_Email_LeadGen_ProductLaunch	Channel	Email	LeadGen	ES
202107_Email_Newsletter	Channel	Email	Newsletter	ES
Website_DemoForm	Conversion Point			
Website_NewsletterForm	Conversion Point			
Website_WebinarForm	Conversion Point			

Tip #3

--

Campaign Member automated association

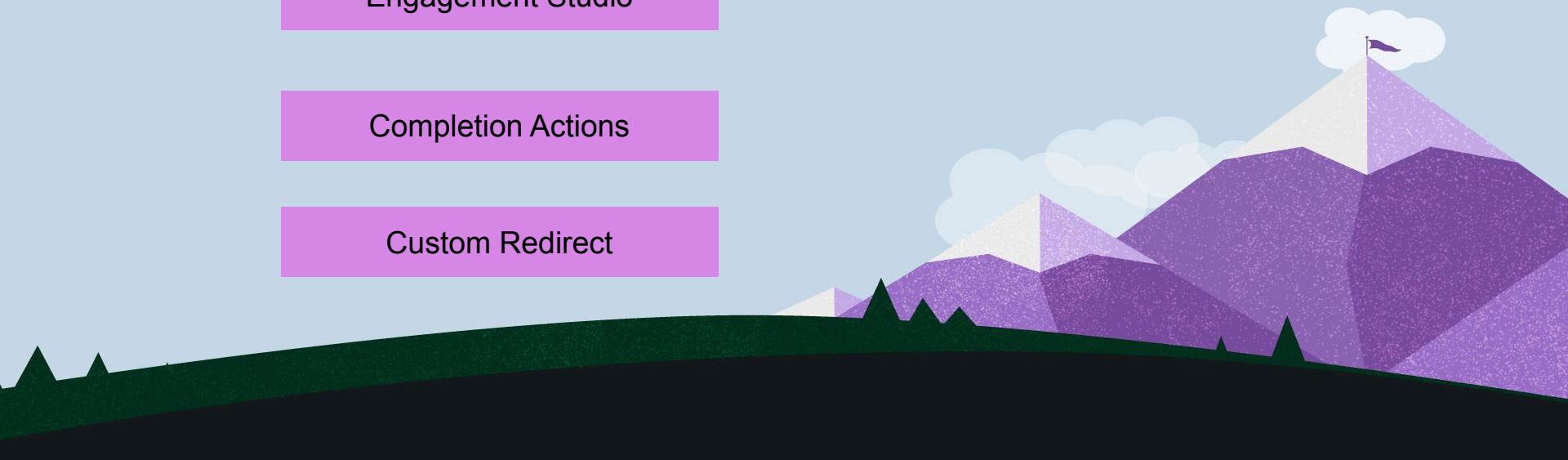


Automation Rules

Engagement Studio

Completion Actions

Custom Redirect



Automation Rules

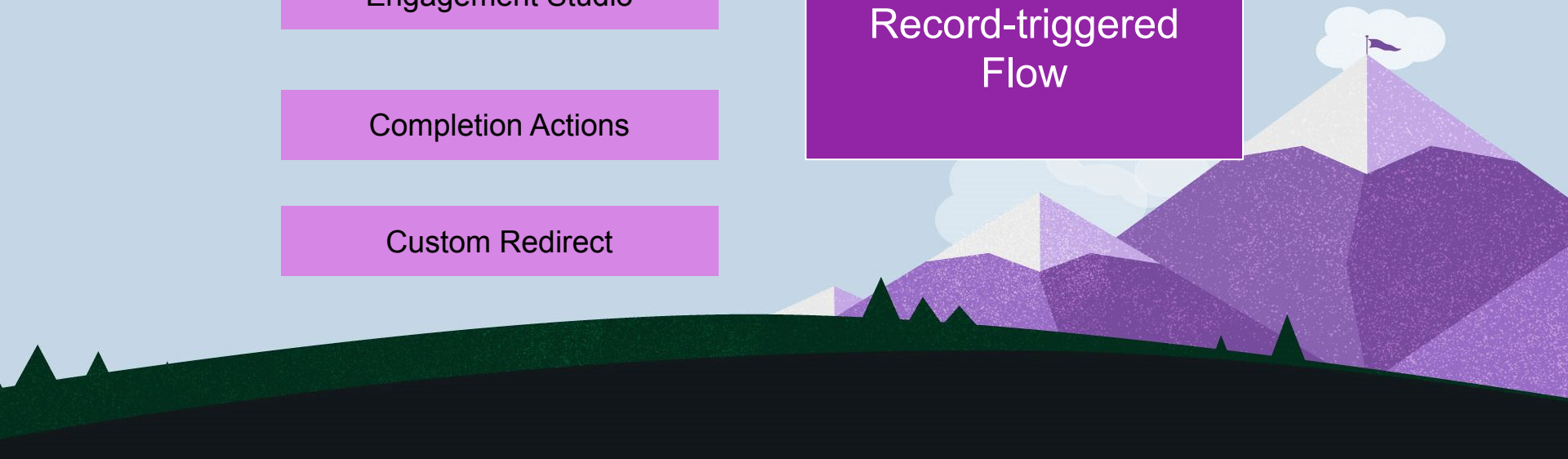
Engagement Studio

Completion Actions

Custom Redirect

TIP #3

Record-triggered
Flow



Launch Camp.

Email



Linkedin Ads



Facebook



WEBSITE www.mywebsite.com

[www.mywebsite.com?utm_medium=Email&utm_source=LeadGen
&utm_campaign=2021Q3_ProductLaunch_Email](http://www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email)

[www.mywebsite.com?utm_medium=PaidSocial&utm_source=Link
edin&utm_campaign=2021Q3_ProductLaunch_LKads](http://www.mywebsite.com?utm_medium=PaidSocial&utm_source=LinkedIn&utm_campaign=2021Q3_ProductLaunch_LKads)

[www.mywebsite.com?utm_medium=SocialMedia&utm_source=Fa
cebook&utm_campaign=2021Q3_ProductLaunch_FB](http://www.mywebsite.com?utm_medium=SocialMedia&utm_source=Facebook&utm_campaign=2021Q3_ProductLaunch_FB)



The screenshot shows the Pardot 'Campaigns' page for a campaign named '2021Q3_ProductLaunch'. The interface includes a top navigation bar with 'Settings', 'Pardot Campaigns', 'Campaigns', and 'Marketing Forms'. Below the navigation, there are buttons for 'Delete', 'Clone', and 'Change Owner'. The main content area is divided into sections: 'Related Campaigns' (with links for 'Pardot Email', 'Content', and 'Pardot'), 'Campaign Details', and 'Activity'. The 'Campaign Details' section includes fields for Campaign Name, Channel (Email), Country (Global), Description (TEST JULIEN), Start Date, and End Date. The 'Activity' section shows filters and a message: 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.'

Launch Camp.

Email



Linkedin Ads



Facebook



WEBSITE www.mywebsite.com

www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=7013000000H1ioQAC

www.mywebsite.com?utm_medium=PaidSocial&utm_source=LinkedIn&utm_campaign=2021Q3_ProductLaunch_LKads&SFCID=7013000000Ty0o3C

www.mywebsite.com?utm_medium=SocialMedia&utm_source=Facebook&utm_campaign=2021Q3_ProductLaunch_FB&SFCID=7013000000B5uTDEc0

MY WEBSITE

www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=70100021452

SFCID=
70100021452






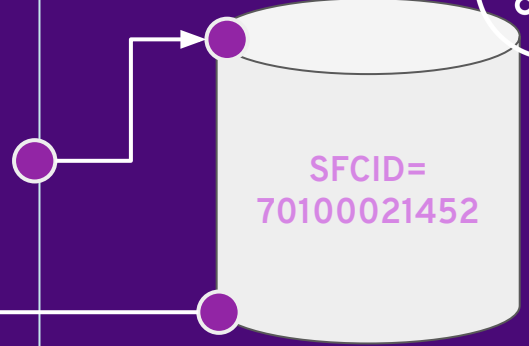
by STENOBIITE

MY WEBSITE

www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=70100021452

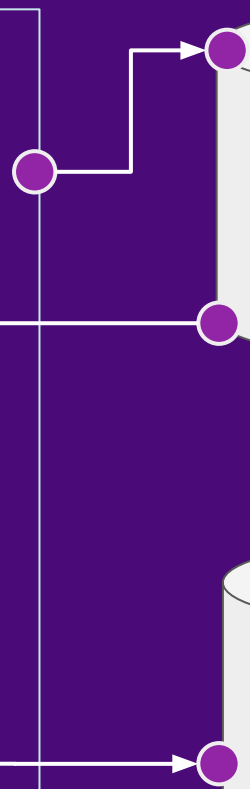


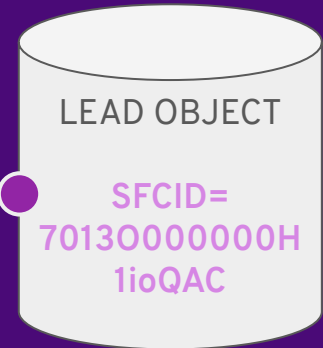
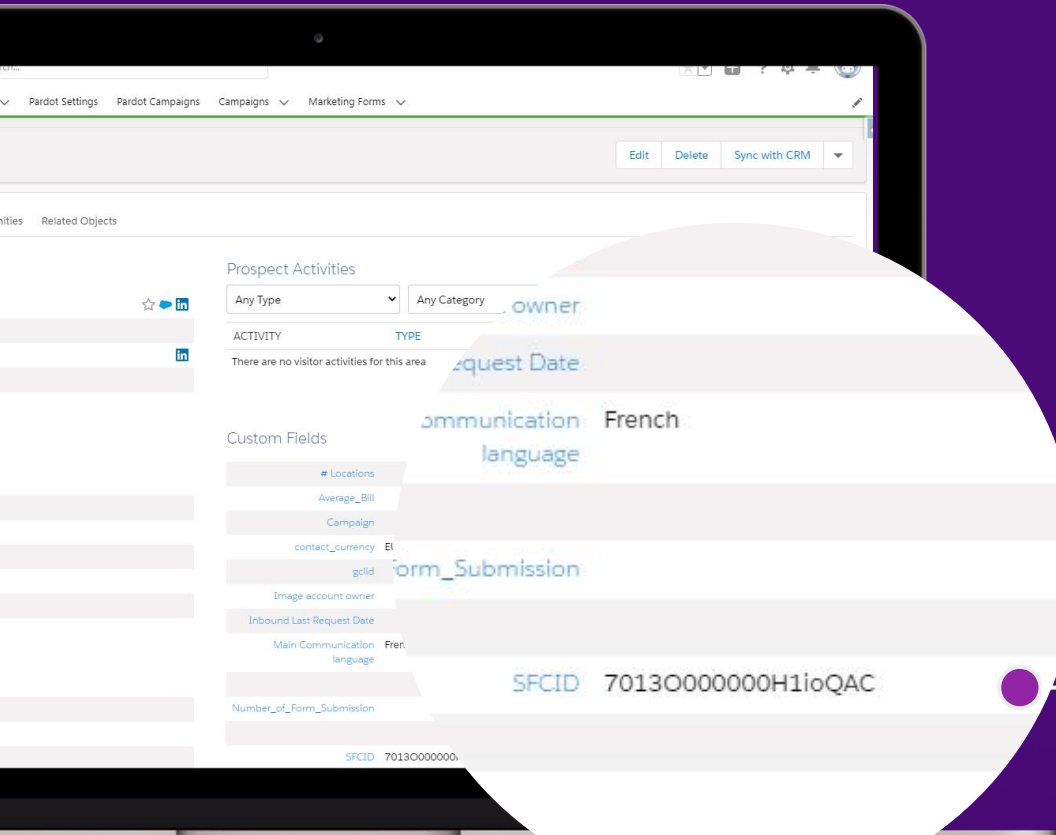
SFCID=
70100021452



MY WEBSITE

www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=70100021452

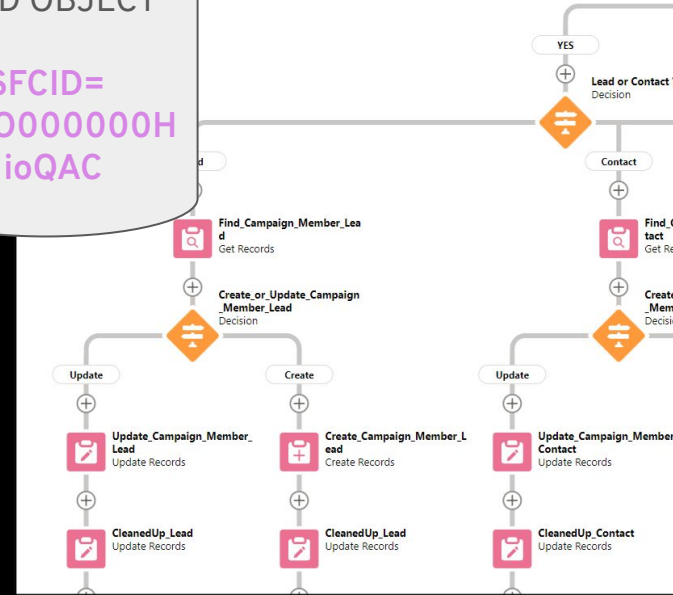




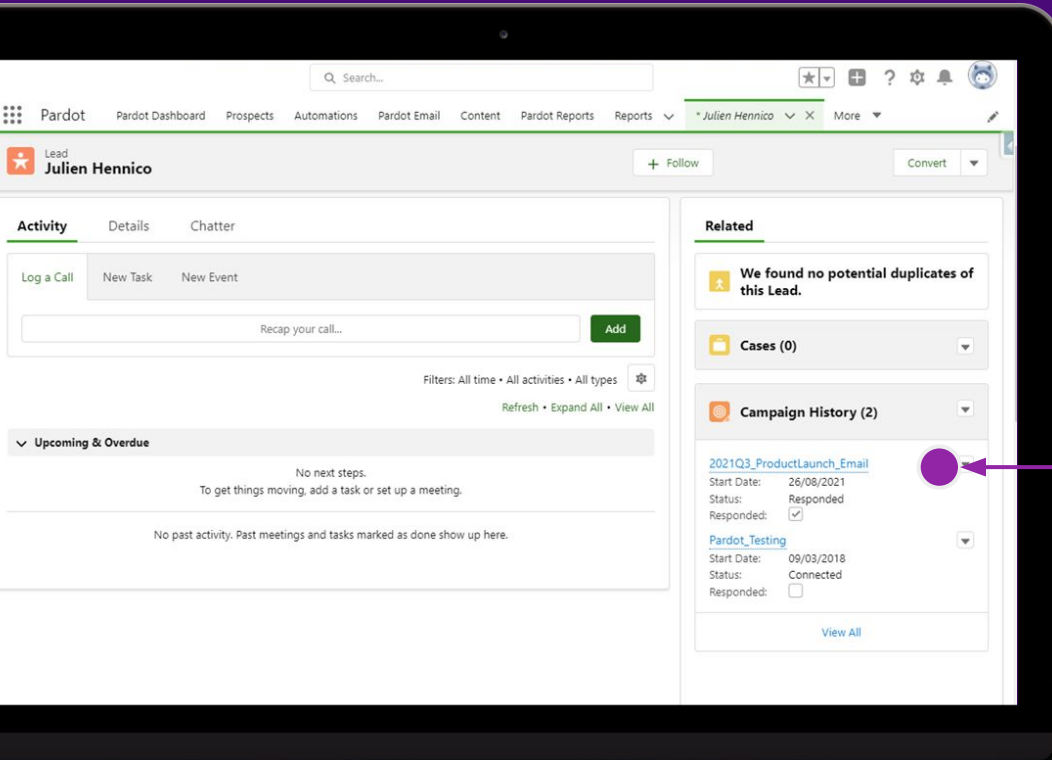
salesforce

LEAD OBJECT

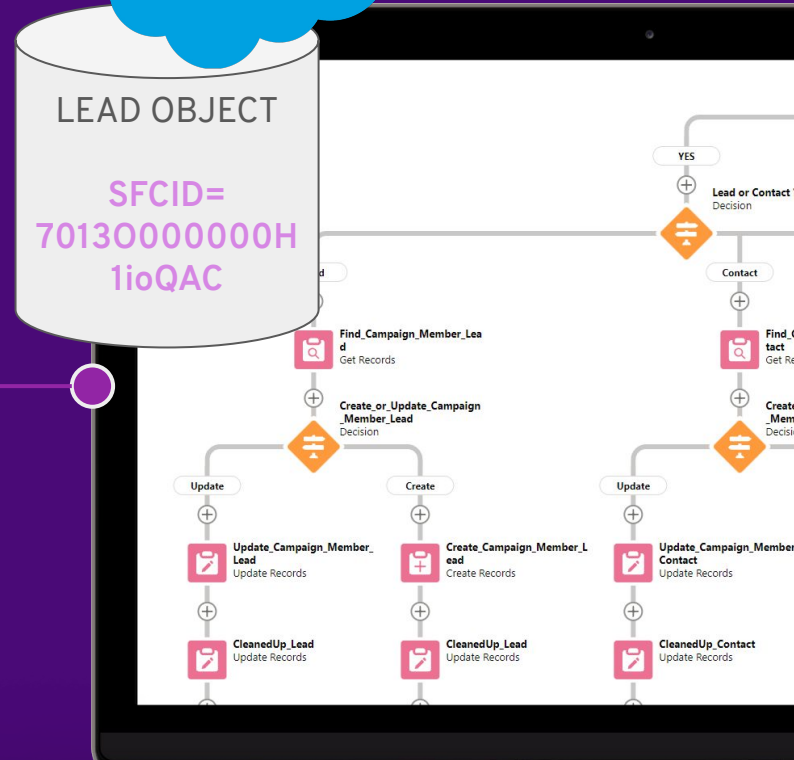
SFCID=
70130000000H
1ioQAC



salesforce



The screenshot shows the Pardot interface for a lead named Julien Hennico. The top navigation bar includes 'Pardot', 'Pardot Dashboard', 'Prospects', 'Automations', 'Pardot Email', 'Content', 'Pardot Reports', and 'Reports'. The lead's name 'Julien Hennico' is displayed with a 'Convert' button. The 'Activity' section shows options for 'Log a Call', 'New Task', and 'New Event'. The 'Related' section contains three items: a message about potential duplicates, 'Cases (0)', and 'Campaign History (2)'. The 'Campaign History' section lists two campaigns: '2021Q3_ProductLaunch_Email' (started 26/08/2021, status 'Responded') and 'Pardot_Testing' (started 09/03/2018, status 'Connected'). A purple circle highlights the 'View All' link under the second campaign.

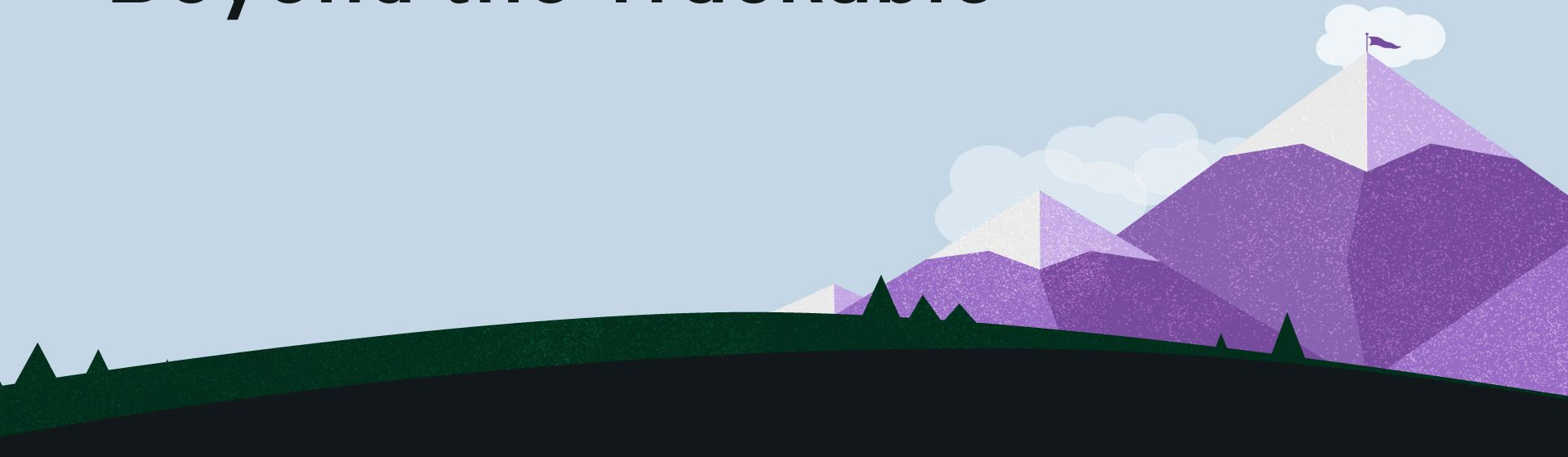




Tip #4

--

Beyond the Trackable



Launch Camp.

Email



WEBSITE
www.mywebsite.com

**www.mywebsite.com?utm_medium=Email&utm_source=LeadGen
&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=701300
0000H1ioQAC**

Launch Camp.

Email



SEO



Social Media

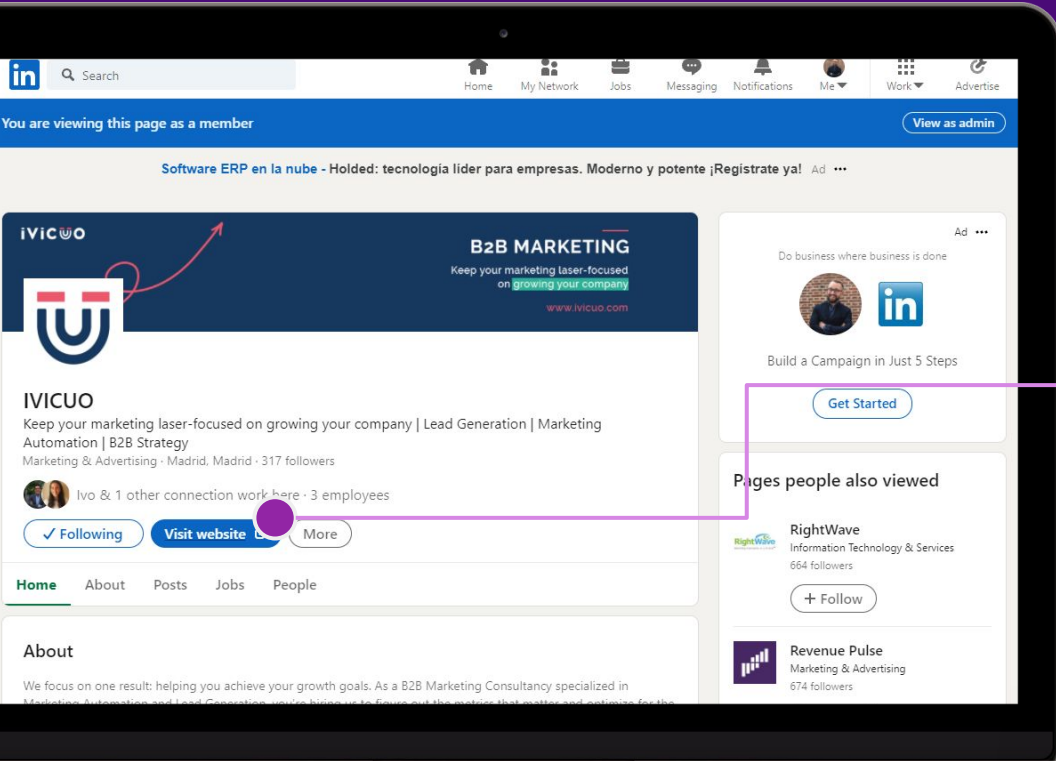


WEBSITE www.mywebsite.com

[www.mywebsite.com?utm_medium=Email&utm_source=LeadGen
&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=701300
0000H1ioQAC](http://www.mywebsite.com?utm_medium=Email&utm_source=LeadGen&utm_campaign=2021Q3_ProductLaunch_Email&SFCID=7013000000H1ioQAC)

www.mywebsite.com

www.mywebsite.com

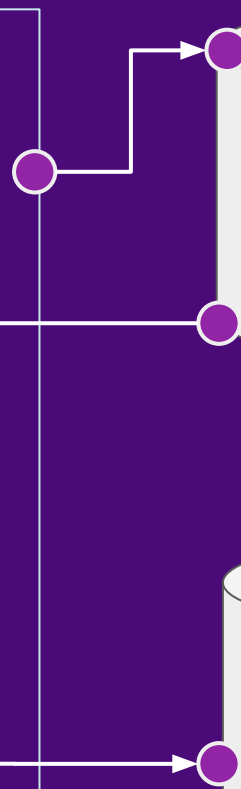


document.referrer

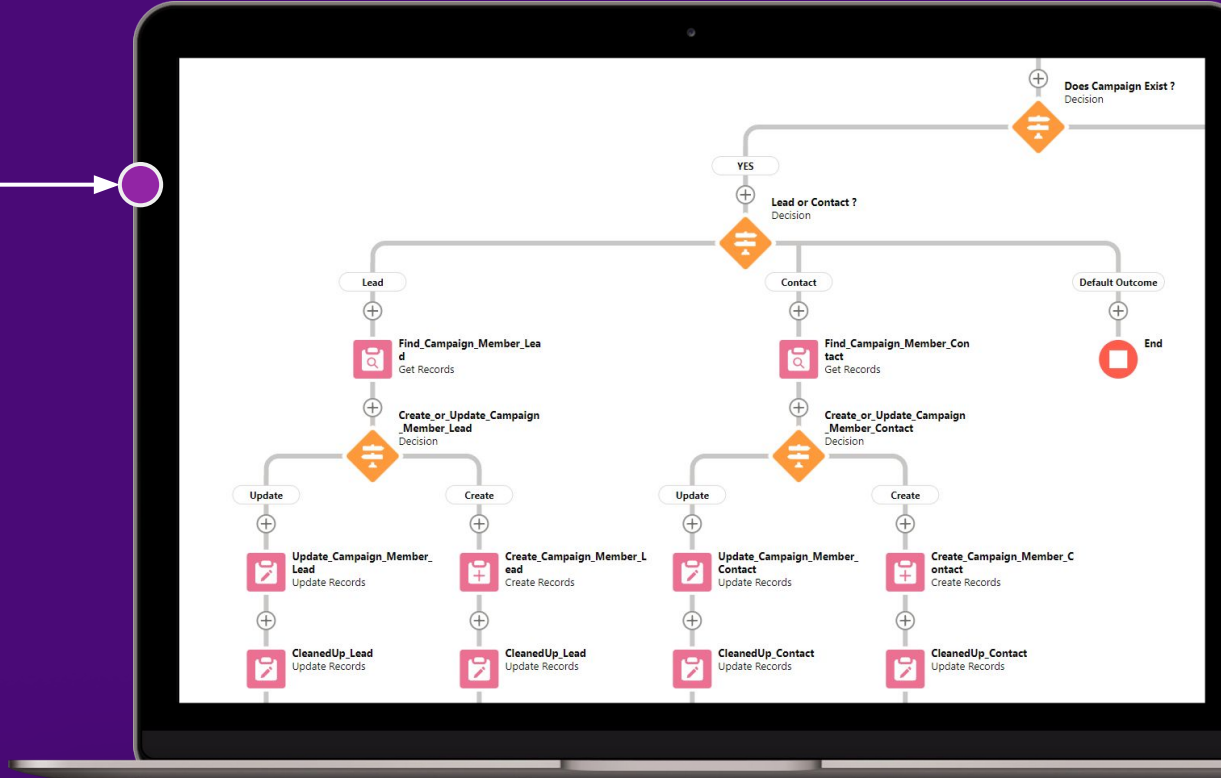


MY WEBSITE

www.mywebsite.com



salesforce pardot





Tip #5

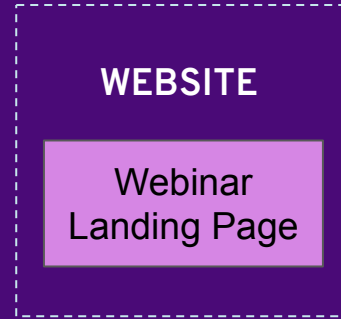
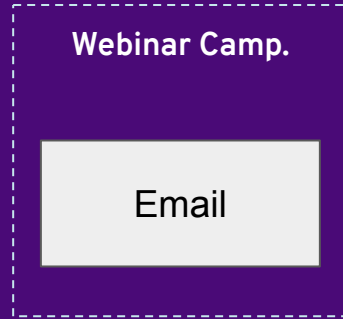
--

Organizing Campaign member status



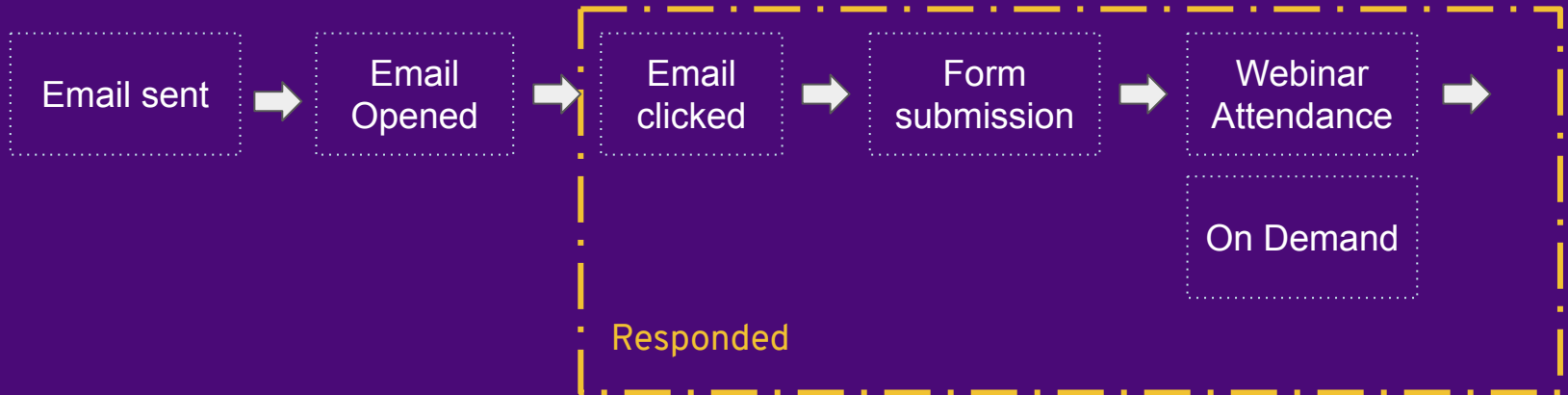
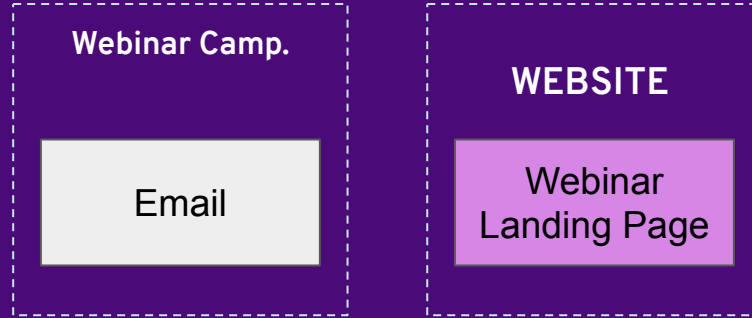
**Question:
What's
responded?**

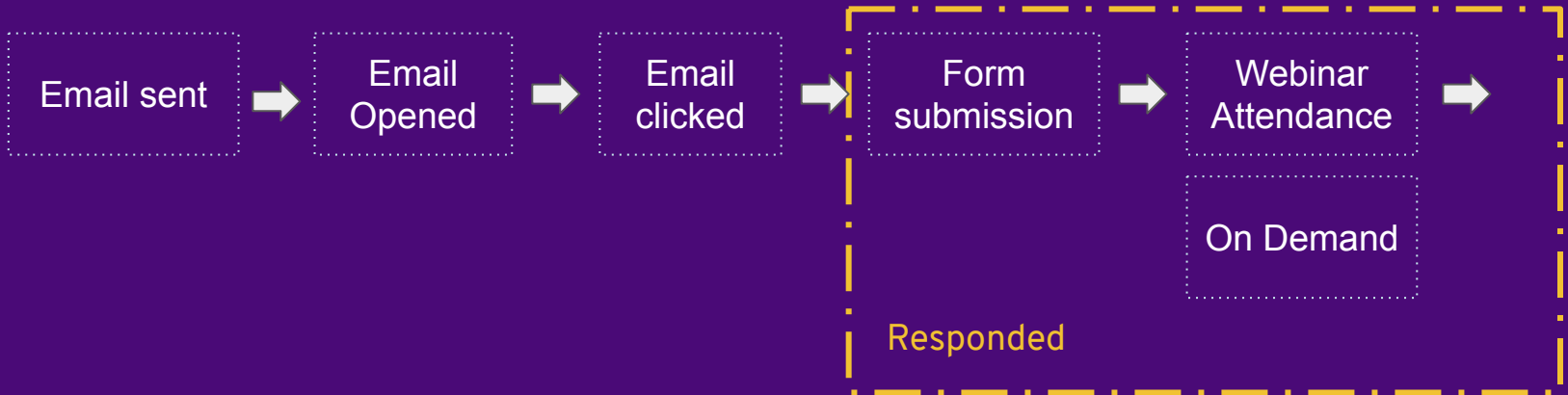
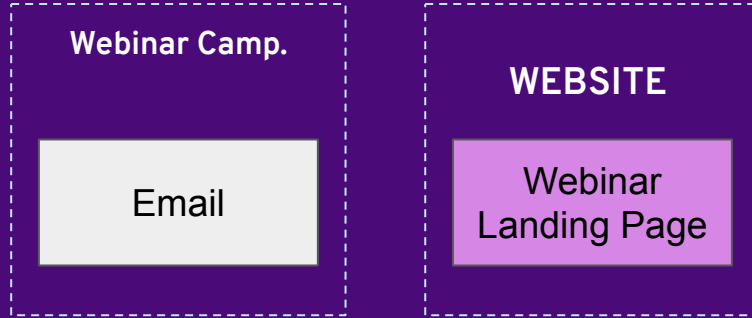


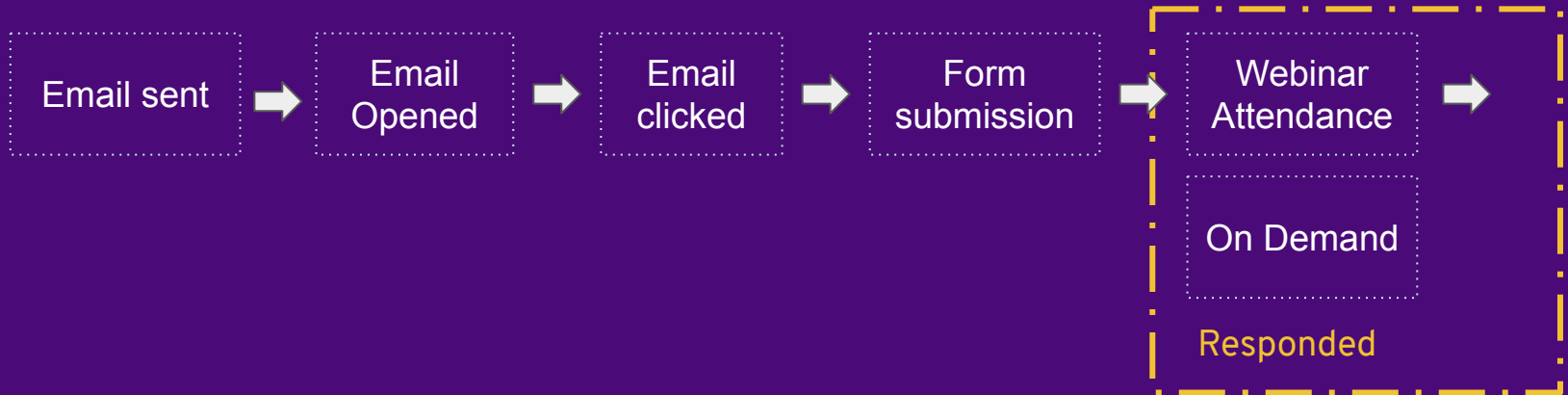
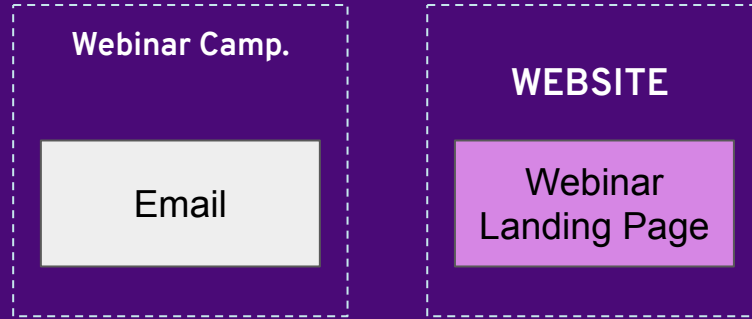


Tip #5



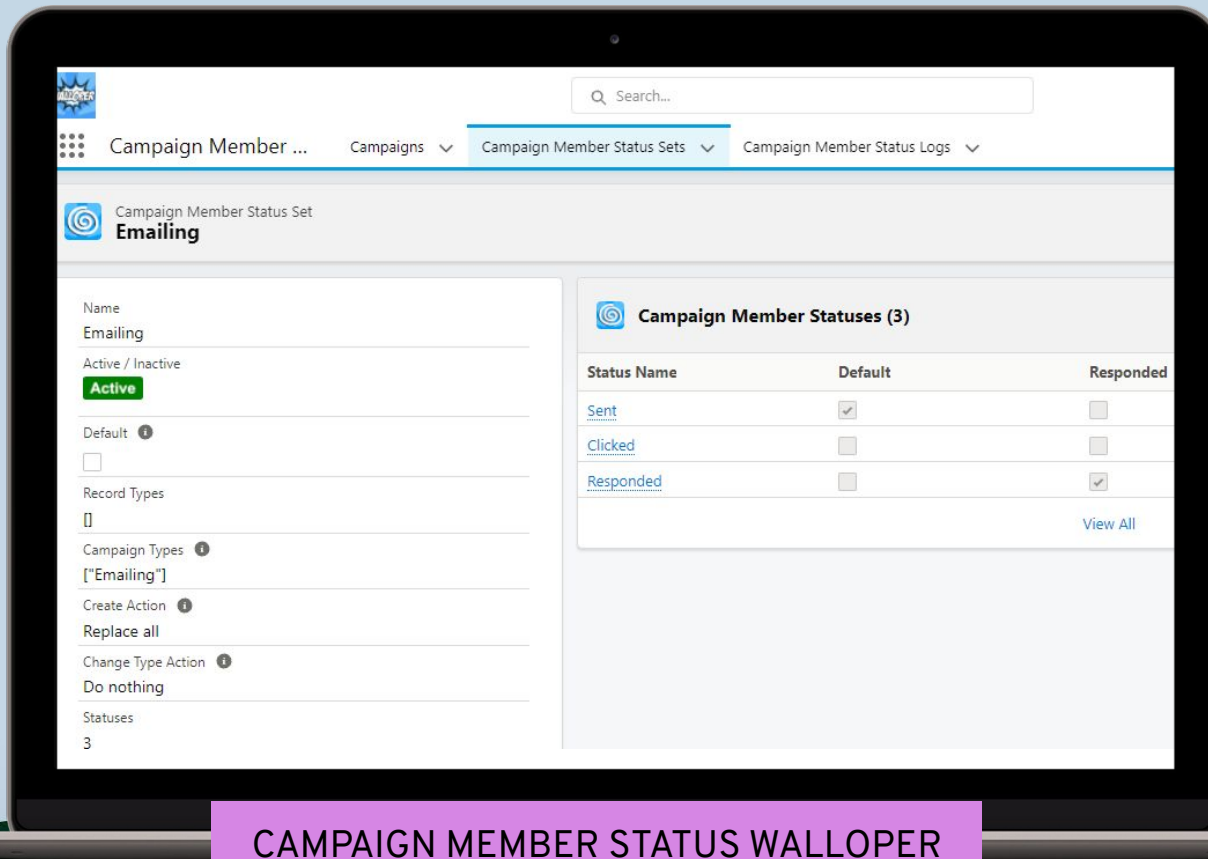






Paid	Youtube Ads	Engaged Responded
	Display Ads	
	Branded Content	
	Google Ads	
	Bing Ads	
Social Media	Facebook	Invited Registered Attended Spoke in event No show
	Twitter	
	LinkedIn	
	Youtube	
	Instagram	
	Slack	
Trade	Offline event	Sent Clicked Form submitted
Emailing	Lead Gen	
	Nurturing	
	Newsletter	





CAMPAIGN MEMBER STATUS WALLOPER



Tip #6

--

**Exclude no relevant
campaigns from
your influence**



Auto-Association Settings

Auto-Association

Use auto-association rules to automatically create campaign influence records.

Limits
Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with a campaign and the date of the campaign influence records.
Campaign Influence Time Frame days

Campaign Influence Eligibility Limits
Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with a campaign and the date of the campaign influence records.
Campaign Influence Time Frame days

Auto-Association Rules
Association rules specify additional criteria for automatic association.

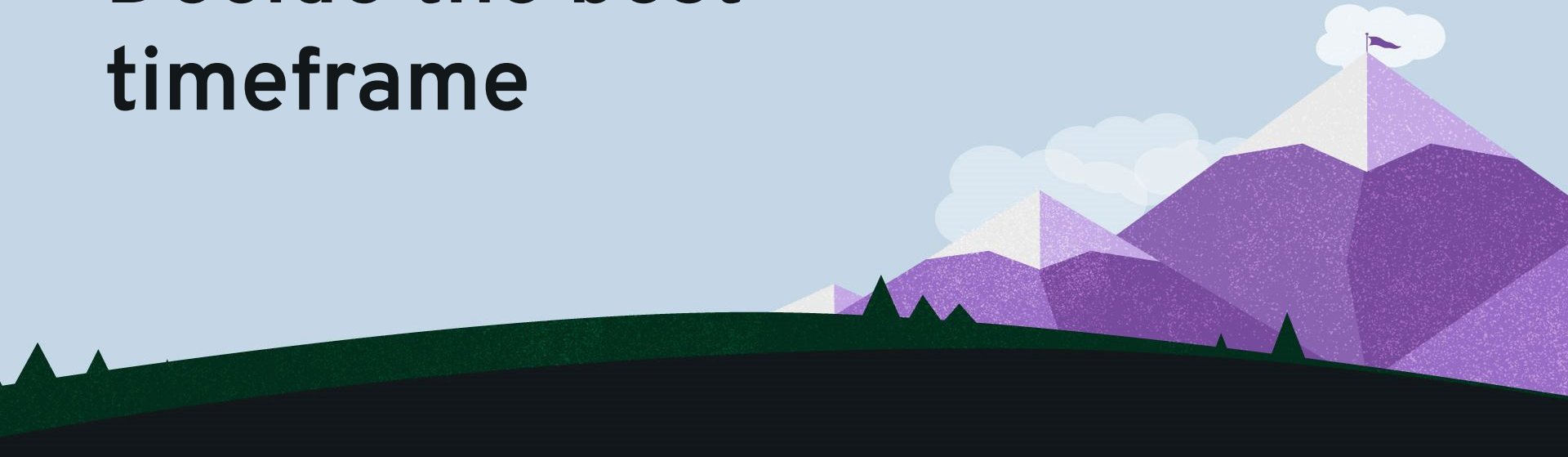
Field	Operator	Value
1. <input type="text" value="Responded"/>	<input type="text" value="equals"/>	<input type="text" value="True"/>
2. <input type="text" value="Type"/>	<input type="text" value="not equal to"/>	<input type="text" value="Web Request,Other"/>
3. <input type="text" value="Responded"/>	<input type="text" value="equals"/>	<input type="text" value=""/>
4. <input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>
5. <input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>

Add Row Remove Row

Bonus Tip

--

Decide the best timeframe



WITHOUT
historical data



Talk to your Sales
Team

WITH
historical data



‘Opportunity closed date’

-

‘Pardot created Date’

The screenshot displays a software interface with a 'Columns' panel on the left and a 'Formula' editor on the right. The 'Columns' panel lists several columns: 'Full Name', 'Opportunity Name', 'Opportunity ID', 'Close Date', 'Pardot Created Date', and 'fx From Created to closed'. The 'fx From Created to closed' column is highlighted with a blue border. The 'Formula' editor shows the formula: `Opportunity.CloseDate - DATEVALUE(Contact.pi_created_date_c)`. Below the formula editor, there is an 'Edit Formula' button and a 'Summarize' section with checkboxes for 'Sum', 'Average', 'Max', and 'Min'. The 'Average' checkbox is checked. The interface also shows a search bar for adding columns and a date filter for 'February 2021'.

Columns

Add column...

Full Name ×

Opportunity Name ×

Opportunity ID ×

Close Date ×

Pardot Created Date ×

fx From Created to closed ×

Edit Column

Formula

Opportunity.CloseDate -
DATEVALUE(Contact.pi_created_date_c)

Edit Formula

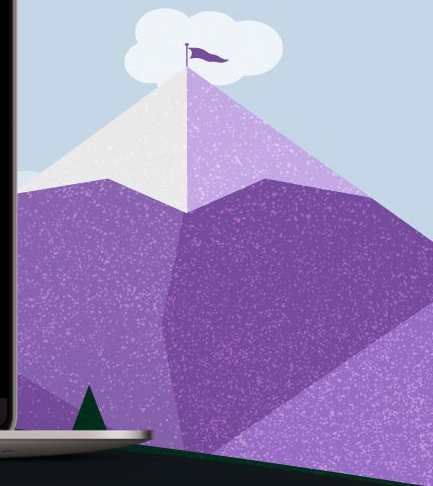
Summarize

Sum

Average

Max

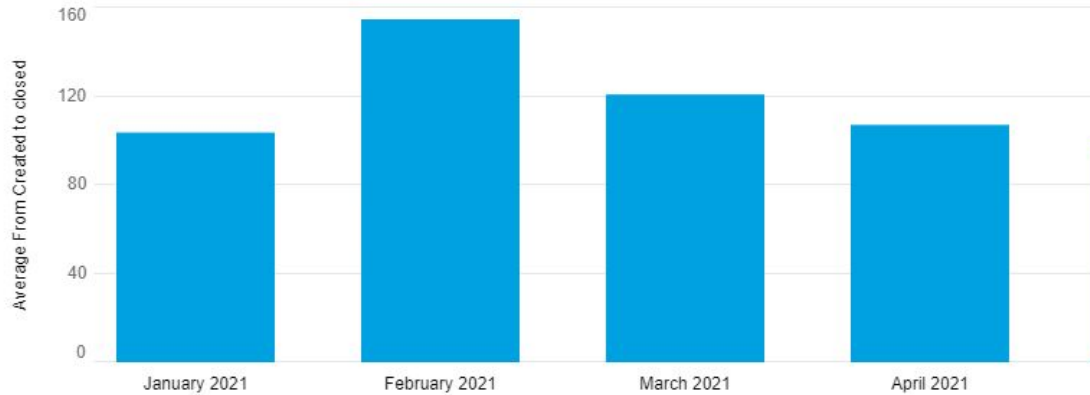
Min





Report: Contacts with Opportunities IC
Won Opps

Total Records	Unique Opportunity ID	Average From Created to closed
10,693	10,693	117



#6 CAMPAIGN TIPS

🐱 #1 - Spend more time planning

🐱 #2 - Goals & Campaign Structure

🐱 #3 - Campaign Member auto-association

🐱 #4 - Beyond the Trackable

🐱 #5 - Organizing Campaign member status

🐱 #6 - Exclude no relevant campaigns from your influence



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